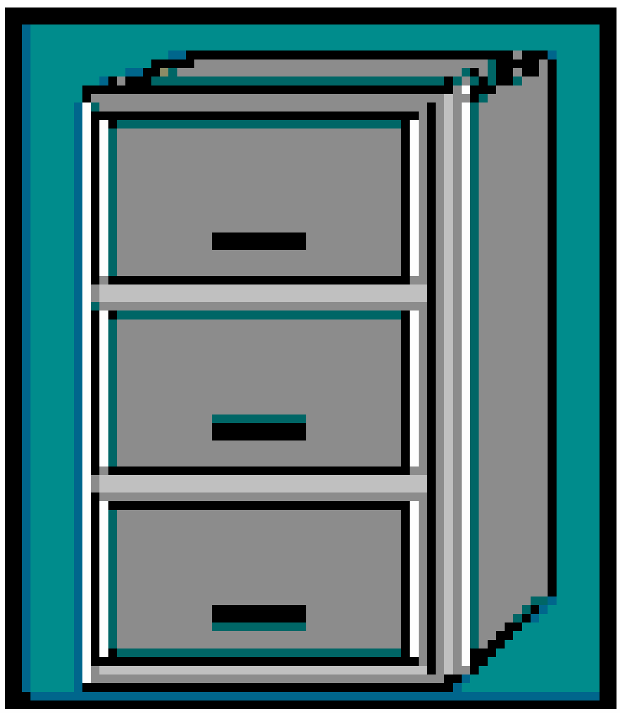
Chapter

8

Operations Management

Arizona AIM System



Local Agency User Manual

April 2005

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Capabilities

The Operations Management functional area is intended to provide general support to WIC Local Agencies and Clinics by automating administrative tasks and reports at those sites. It captures contact information and statistics for Local Agencies and Clinics, and tracks various activities at those sites. This functional area also captures contact data for individuals and organizations that may be useful in outreach efforts to identify potential WIC participants.

General Description

Operations Management is made up of the following functions:

Monitor Administrative Operations

It is important for the System to provide information about the regular operations at the Local Agencies including number of education classes given, number of participants added to the program, and the number of food instruments issued during each month. Other statistical information on the Local Agencies and Clinics, such as staffing levels and positions, participant-to-staff ratios, nutritionist-to-staff ratios, and cost per participant figures, will be available for analysis by State and Local Agencies. This data is helpful for improving participant service and clinic flow, and making funding decisions.

The System is able to maintain Local Agency and Clinic information. This information will be available to State and Local Agency staff on display windows and reports and will describe the characteristics of Local Agencies and/or Clinics. A Local Agency's activity includes all aspects of the site's operations including certification and termination of WIC enrollees, provision of nutrition education, and issuance of food instruments. The WIC System will provide individual reports to each of the Local Agencies and Clinics, and all of these reports will also be available to the State Agency upon request. It will be noted that much of the activity information provided in these reports is captured and maintained by other functional areas within the overall WIC System.

Maintain Information on Local Agencies and Clinics

The WIC System will support this function by collecting and storing data about Local Agencies and Clinics. The System will retrieve data to provide reports and display windows for a given Local Agency. The System allows users to maintain a database of information regarding the organizational structure of the WIC Program. All levels of one organization can be created and unified together into an organization structure. In Arizona WIC this would mean creating a State Agency, Local Agencies, and Clinics. The System will report on the Arizona WIC organization in the FCS648 format, which is acceptable as submission for federal reporting. Additionally, this function allows users to maintain the list of programs that they refer participants to or that are referred from as well as the outreach organizations administering those programs.

Produce Management Information Reports

The WIC System will support this function by retrieving data from various data stores to produce required management information reports and display windows. The WIC System will produce monthly activity reports at the Local Agency level (by Clinic and Local Agency summary), and a summary report at the State level.

Local Agency Operating Characteristics Reports

The System reports on selected agency operating characteristics using the latest data available. For example, the staff currently serving an organizational unit can be reported upon using the directory reporting function.

Another previously mentioned report, the on-demand “WIC Participant Status Report” described in the Caseload Management functionality may also be considered an Operations Management tool. It reports data affecting caseload decisions such as summaries of enrollees, applicants, categorical eligibility, wait-listed applicants, and terminations. The System also reports on referrals to/from WIC.

Also using information from the Operations Management area, users can track the participant to staff ratio for evaluating staff effectiveness and program staffing levels.

Produce Agency Mailing Labels

The WIC System enables users to generate mailing labels for all Local Agencies in the organization. The labels are produced for correspondence sent to the Local Agency WIC coordinator.

Maintain Staff Information

The WIC System allows users to capture and maintain staff information and then assign the staff to the organizational unit that they support. This information is valuable in the Appointment Scheduling function as well as in the Operations Management area.

Staff members can be assigned to more than one organizational unit. In the Caseload Management area, the same staff data will be used to report on staffing ratios versus actual and estimated caseload.

The ability to mark staff positions as vacant or pseudo is also available to aid in determining staffing levels and scheduling.

Maintain Organizational Units

The WIC System allows users to capture and maintain organizations of different types, for example, State Agencies, Local Agencies, and Clinics.

Maintain Outreach/Referral Organizations

The WIC System allows users to capture and maintain different types of Outreach/Referral organizations, for example, Health Maintenance Organizations, Breastfeeding Organizations, etc.

Maintain Programs

The System will promote the capture and maintenance of information regarding Outreach/Referral organizations and the programs that they provide. This information is particularly useful in targeting outreach efforts and referrals to/from these efforts.

The Operations Management function allows users to maintain information about the programs and funding sources used to support those programs. It is important to capture this information for production of the Local Agency Directory as well as in determining the programs that will be holding clinics into which participants are scheduled.

Maintain Outreach/Referral Organization Types

The WIC System will maintain a database of State and Local Agencies who might be contacted for WIC outreach purposes. This database will be used in the certification process to build the referrals “from/to” information. It will also be used in helping the WIC Program determine the organizations that are most effective in building WIC Caseload.

Maintain Outreach/Referral Communication Type

The Operations Management function allows the user to maintain information about the methods used to communicate with State and Local Outreach/Referral organizations. This function will be used to identify those methods.

Maintain Staff Titles

The Operations Management function allows users to maintain information about the staff member titles. This function will be used to create and update staff titles.

Maintain Title Categories

The Operations Management function allows users to maintain information about the staff member title categories. This function will be used to create and update title categories.

Track Communications By Local Agencies

The Operations Management function allows user to maintain information about the communications with State and Local Outreach/Referral organizations. This function will be used to track Outreach/Referral organization communications.

Manage Participant Outreach/Referrals

It is important for the System to provide information about the State and Local Agencies that might be contacted for WIC outreach purposes. The Operations Management function enables users to capture and maintain data about Outreach/Referral organizations, including contacts referrals, and location information. It also provides reports of referrals mailing lists, and mailing labels.

Maintain Outreach/Referral contact List for Local Agencies

The Operations Management function allows the user to maintain information about the State and Local Agencies that might be contacted for WIC outreach purposes. This information will be used in the certification process to build the referrals "from/to" information. It will also be used in helping the WIC Program determine the organizations that are most effective in building the WIC Caseload.

Track Referrals to Other Health and Social Services

The WIC System will assist in determining where referrals come from and go to by providing appropriate reporting.

Produce Outreach/Referral Organization Mailing Labels

The WIC System enables users to generate mailing labels for Outreach/Referral organizations tracked in the organizational unit and Outreach/Referral organization data stores. Labels can be generated at the Local Agency as well as the State Agency.

Update Time Study Daily Log

The WIC System enables the user to capture and maintain individual staff member's activity information in the following areas:

- Participant Services
- Nutrition Education
- Breastfeeding
- Administration
- Immunization
- CSFP
- Tobacco
- Other

Individual staff at the State or Local Agency level may enter their activity information that is them combined with other salary and budget information to produce the time study report.

Update Annual WIC Cost Summary

The System allows the user to generate the Annual Cost Summary report for his/her organization unit utilizing the Time Study Daily Logs and additional salary and budget information. The user may capture, display and maintain data for a Fiscal Year.

Description of Operations Management Functions

When clicking the Operations Management button from the AIM System Master Menu, the following Arizona Splash Menu screen will be displayed:

Figure 1 - Operations Management Splash Menu

Maintaining Staff Data

To Maintain Staff Data:

1. Click on Operations Mgt. from the menu bar.
2. Click on Staff Data as shown below:

The Staff Data Window is displayed:

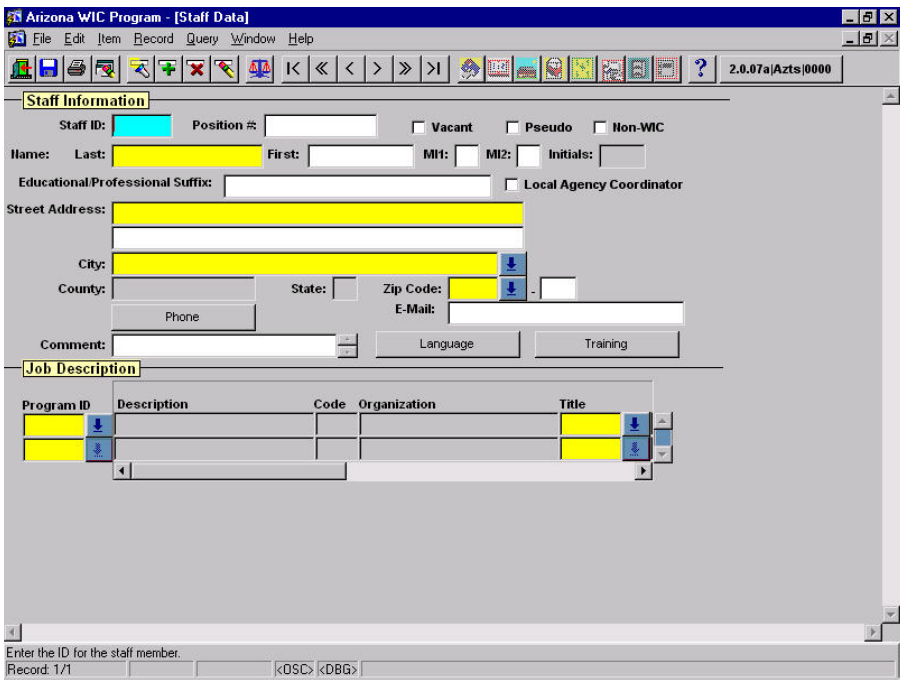


Figure 2 – Maintain Staff Data

Add a Staff Member

1. TAB off the Staff ID field and the system will generate the staff member's ID number.
2. Enter the new Position # (the Position # must be 10 digits in length and may be in an alphanumeric format).
3. To indicate if the new position is Vacant, Pseudo, or Non-WIC, click the correct check box.
4. Enter the new Staff Member's name and professional or educational suffix (i.e., as M.D. or RN).
5. Click the check box marked "Local Agency Coordinator," if appropriate.
6. Enter the street address of the Staff Member.

7. Click the list of values button (the down arrow) on the right of the City field. The Locales pop-up window is displayed.
8. Select the City, State, and Zip Code. If necessary, use the scroll bar to bring the information into view. Double click on the selected item and the system will automatically insert the information.
9. Click the Phone button and the pop up box shown in Figure 3 – Maintain Staff Data (Phone Pop-Up) will be displayed. Enter the new Staff Member's phone information, then click the OK button to save and exit the window.

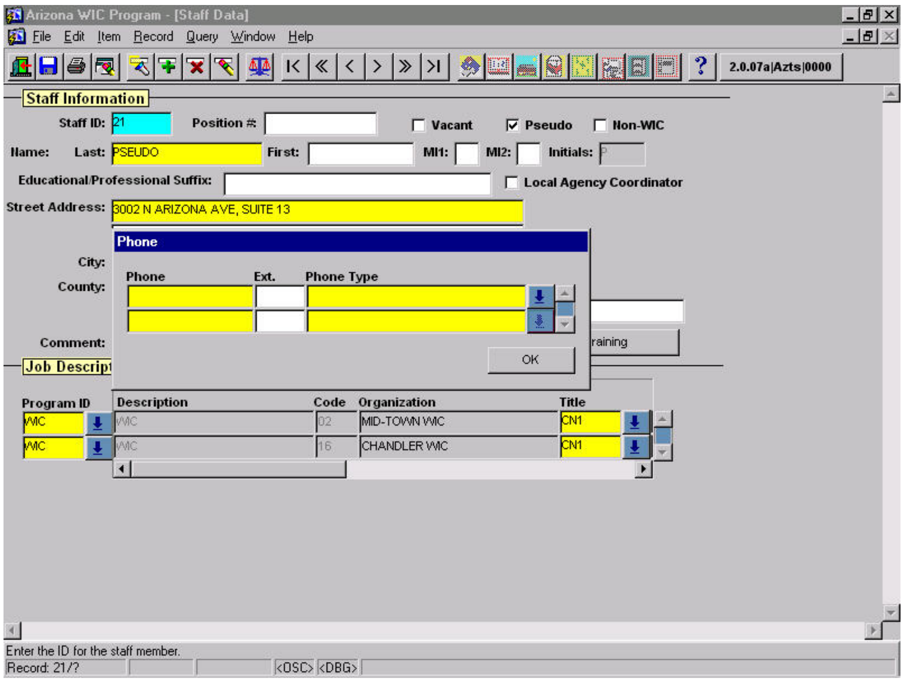


Figure 3 – Maintain Staff Data (Phone Pop-Up)

10. Click the Language button and the pop-up box show below will be displayed Figure 4 – Maintain Staff Data (Language Pop-Up). Use the Primary LOV to select the appropriate primary language for this staff member. This field is mandatory. Use the Secondary LOV to select the appropriate secondary language for this staff member. Click OK to close the pop-up.

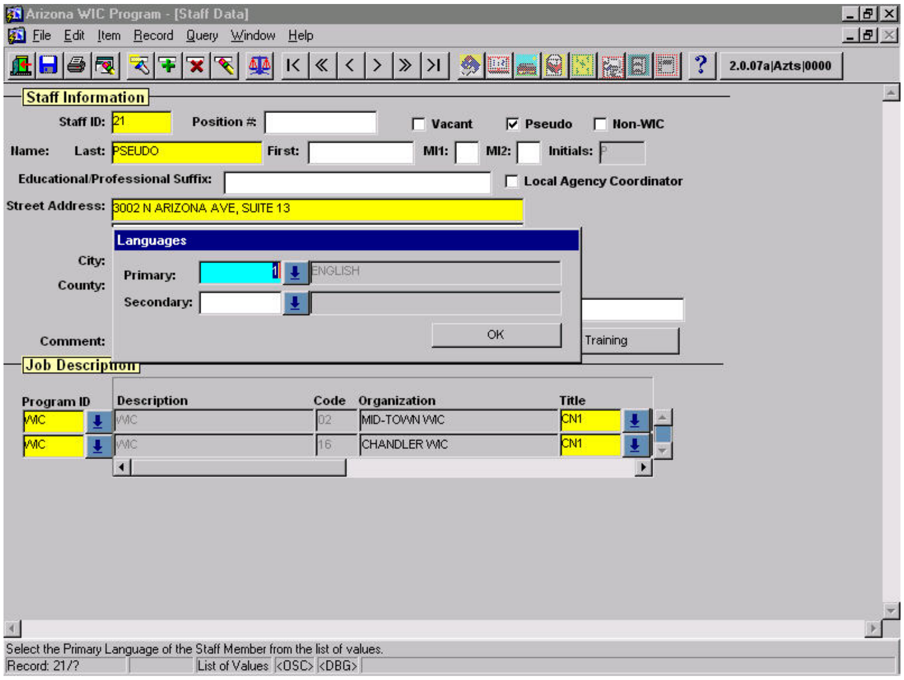


Figure 4 – Maintain Staff Data (Language Pop-Up)

11. Click on Training button and the Training pop-up will be displayed Figure 5 - Maintain Staff Data (Training Pop-Up). Complete the following fields with the appropriate information:

    - Date
    - Class Topic
    - Location
    - Instructor
    - Duration
    - Cost

12. Check the appropriate check box to indicate the type of training. The Next and Previous buttons will display the next or previous training stored in the system. The most current training will be displayed. To add a new training, place your cursor in the Date and click on the Insert Record icon to clear the fields and allow you to enter new training information.

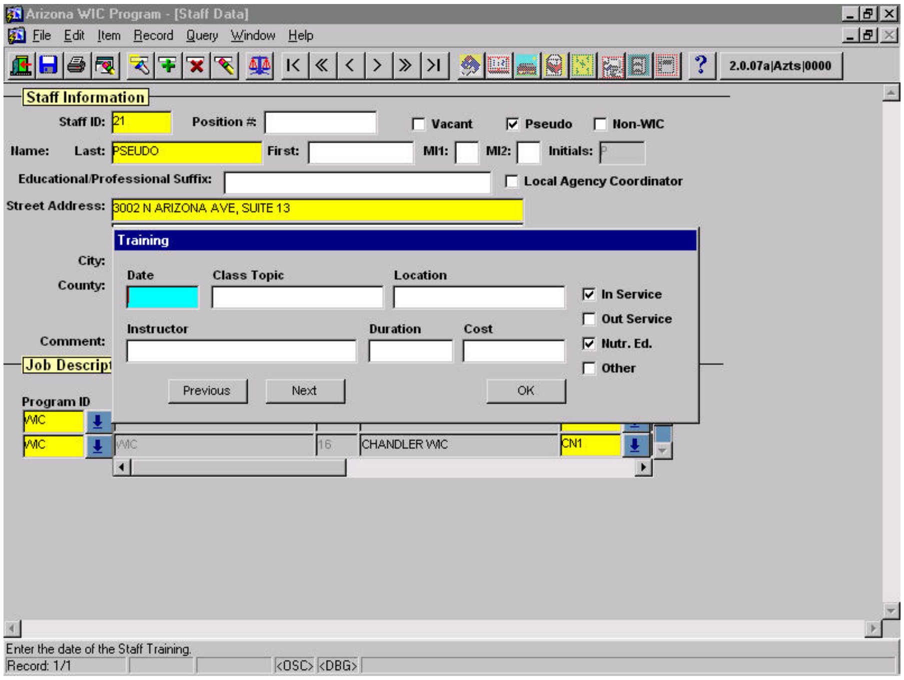


Figure 5 - Maintain Staff Data (Training Pop-Up)

13. Enter any E-mail or comment information pertinent to the new Staff Member.
14. In the Job Description section of the screen, click the list of values button next to the Program field, and select the correct program to assign to the staff member by double clicking on the desired line. The system will automatically populate the Organization field.
15. Click the list of values button to the right of the Title field, then double click to select the correct title for the new staff member.
16. Click the right arrow button of the scroll bar under the Job Description section until the Start Date, End Date, Hrs/Wk, FTE Base, FTE, and Home Org fields are viewable.
17. Enter the appropriate information in these fields. (The date format is MM/DD/YYYY.)
18. Click the Save icon to save the information.

Delete a Staff Member

1. Click on the Enter Query icon.
2. Enter the staff member's ID number, then press the F8 key. The system will display the information of the staff member to delete. (Verify this is the correct record to delete.)
3. Click on the Program field in the Job Description section. Then click on the Remove Record icon. Repeat this process for each job description.
4. Click on the Phone button.
5. Click on a phone number and click the Remove Record icon. Repeat this procedure for each phone number listed. After removing all of the phone numbers, click on the OK button.
6. Click the Save icon to save deletion of phone number(s).
7. Click the Staff ID number, then click the Remove Record icon.
8. Click the Save icon to save deletion of the staff member.

Note: A staff member may not be deleted once they have been used in the AIM system such as in a current appointment schedule or linked with a participant record. These instructions are only for when a staff member is first established.

Update a Staff Member's information (i.e. promotion)

1. Click the Enter Query icon.
2. Enter the staff member's ID number, then press the F8 key. The system will display the staff member information you wish to update.
3. Close out any existing job descriptions by clicking once on the correct title/organization for that staff member.
4. Press the TAB key until the cursor reaches the end date field, and enter the end date using the MM/DD/YYYY format.
5. Click once on an existing job description entry and click the Insert Record icon. This will create a new blank job description for completion.
6. Click the list of values button to right of the Program field, and double click on the name of the WIC Program for the organization that the staff member will be working in.
7. Click the list of values button to the right of the Title field, and double click on the title name that the staff member will now possess.
8. Enter the remaining information for the staff member's start and end dates, hours per week, FTE base, and home organization if applicable.
9. After having completed the entry of the new information, click the Save icon to save the updated staff member's job description information.

Figure 2 – Maintain Staff Data

Fields

Staff ID - The staff person's 5 digit identification number. This field is mandatory and is system generated.
Position # - Item number assigned to particular job title once funded by latest budgeting process. This field is optional.
Last Name - The staff person's last name. This field is mandatory and is user-entered. If the Vacant check box is checked, this will default to VACANT.
First Name - The staff person's first name. This field is optional and is user-entered (except if the Vacant check box is checked).
MI1 - Staff person's middle first initial. This field is optional.
MI2 - Staff person's middle second initial. This field is optional.
Initials - The staff person's initials. This field is display only and is calculated from last, first and middle initials.
Educational/Professional Suffix - The staff person's educational and professional title, such as Ph.D., MPH, etc. This field is optional and is user-entered.
Street Address - The street address of where the staff person works. This field is optional.
City - The city where the staff member works. This field can be entered manually or the user can select a value from the list of values. Selection of a city will fill in the state and zip code. For more information, please refer to Window: Maintain Locales. This field is mandatory.

County - The county in which the staff person works. This field is display only and will be populated when a city or zip code is selected.
State - The State where the staff member works. This field is display only and will be populated when a city or zip code is selected.
Zip Code - The zip code where the staff member works. This field can be entered in manually or the user can select a value from the list of values. Selection of a zip code will fill in the city and state. The additional four-digit code is user entered. For more information, please refer to Window: Zip Codes. The first field is mandatory and the second is optional.
E-Mail - The staff person's E-mail identification.
Comment - The user may provide any comments or remarks. This field is optional.
Program ID - Clicking on the list of values button allows the user to assign the staff member a program supported by a particular organization, such as WIC, MCH, COOP, etc. For more information, please refer to Window: Maintain Programs. This field is mandatory.
Description - The name of the program category selected by the user in the Program ID field. This field is display only.
Code - The code associated with the state Agency or a specific Local Agency or Clinic organization. The field is display only and is populated when Program ID is selected.
Organization - This field is display only and is populated when Program is selected.
Title - Clicking on the list of values button allows the user to assign the staff member a title, such as nutritionist. For more information, please refer to Window: Maintain Staff Titles. This field is mandatory.

Push Button(s)

Phone - Clicking this button allows the user to enter phone information.
Language - Clicking this button allows the user to enter primary and secondary language capabilities of the staff member.
Training - Clicking this button allows the user to enter information about training classes attended by the staff member.

Check Box(es)

Vacant - The Vacant checkbox is available to the user to indicate that the staff member position is vacant. If this box is checked, the last name and first name will be set to "VACANT".
Pseudo - Used to create false staff member for scheduling purposes.
Non-WIC - This identifies a non-WIC staff member.
Local Agency Coordinator - If checked, the staff member is a Local Agency Coordinator.

Figure 3 – Maintain Staff Data (Phone Pop-Up)

Fields

Phone Number - The staff person's work phone number, including area code. This field is optional.
Ext. - The staff person's work extension number, if applicable. This field is optional.
Phone Type - The phone type description for the number entered. This field is mandatory if a phone number is entered.

Push Button(s)

OK - Clicking on this button saves the information entered and returns the user to Figure 1.

Figure 4 – Maintain Staff Data (Language Pop-Up)

Fields

Primary – Clicking the LOV allows the user to select the primary language for this staff member.
Secondary – Clicking the LOV allows the user to select the secondary language for this staff member.

Push Buttons

OK - Clicking this button saves the information entered and closes the pop-up.

Figure 5 - Maintain Staff Data (Training Pop-Up)

Fields

Date – User enters date the training was given. This field is optional.
Class Topic – User enters name of training attended by staff member. This field is optional.
Location – User enters location of training attended by staff member. This field is optional.
Instructor – User enters first and last name of instructor conducting the training. This field is optional.
Duration – Number of hours of training provided. This field is optional.
Cost – The dollar value charged, if any, for the staff member to attend this training. This field is optional.

Check Boxes

If nutrition training data has been completed, it is mandatory for one of the check boxes below to be selected.

In-service – Check this box if training was provided within the WIC program.
Out-service – Check this box if raining was provided outside the WIC program.
Nutr. Ed. – Check this box if the training provided nutrition education.
Other – Check this box if training provided training about topics other than nutrition education.

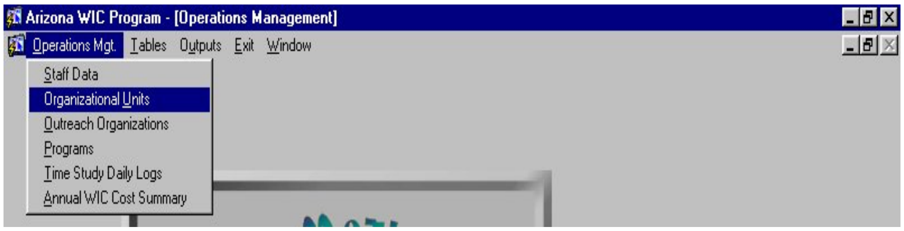
Push Buttons

Next – Clicking this button allows the user to view the next training record.
Previous – Clicking this button allows the user to view the previous training record.
OK - Clicking this button saves the information entered and closes the pop-up.

Maintaining Organizational Units

To Maintain Organizational Units:

1. Click on Operations Mgt. from the menu bar.
2. Click on Organizational Units as shown below:



The Organizational Units Window is displayed:

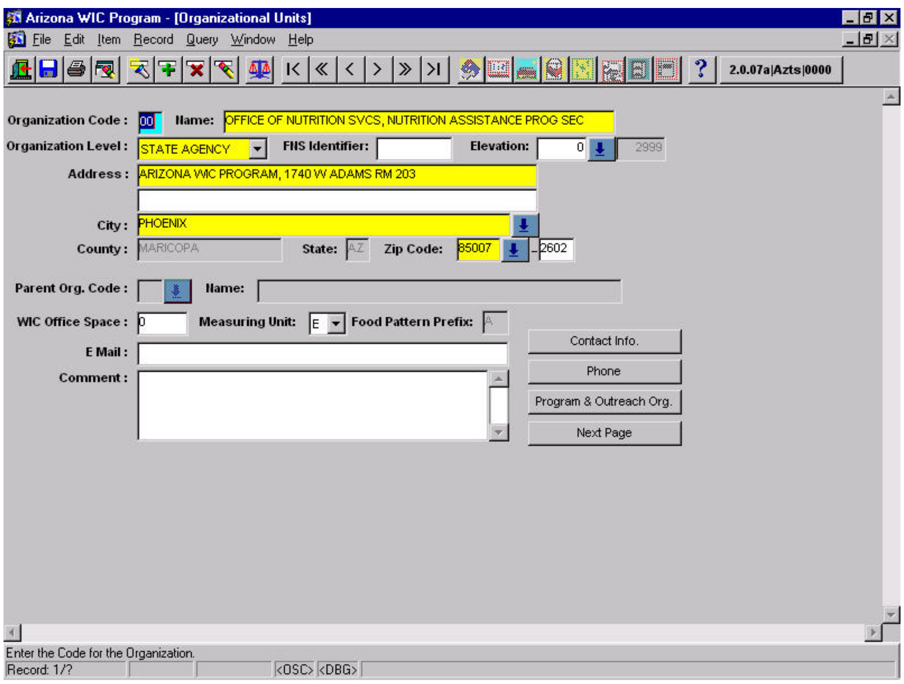


Figure 6 – Maintain Organizational Units

Add an Organizational Unit

1. Enter the Organization Code and Name, then click the drop down button arrow to the right of the Organizational Level field and click the correct value.
2. TAB to the FNS Identifier field and enter the FNS code.
3. Enter elevation in feet above sea level of the organizational unit.
4. Continue typing in the address information and click the list of values button to the right of the City field and select the correct city, state and zip code information by double clicking on the correct line. The system will automatically insert the county and state into the fields.
5. Click the list of values button next to the Parent Org. Code field and double click on the desired choice.
6. Enter the WIC office Space and select the corresponding measuring unit.
7. TAB to the Food Package Prefix field. The system will generate a prefix.

8. Enter any additional information in the E-mail and Comment fields.
9. Click the Contact Info. button and the pop-up box shown in below will be displayed.

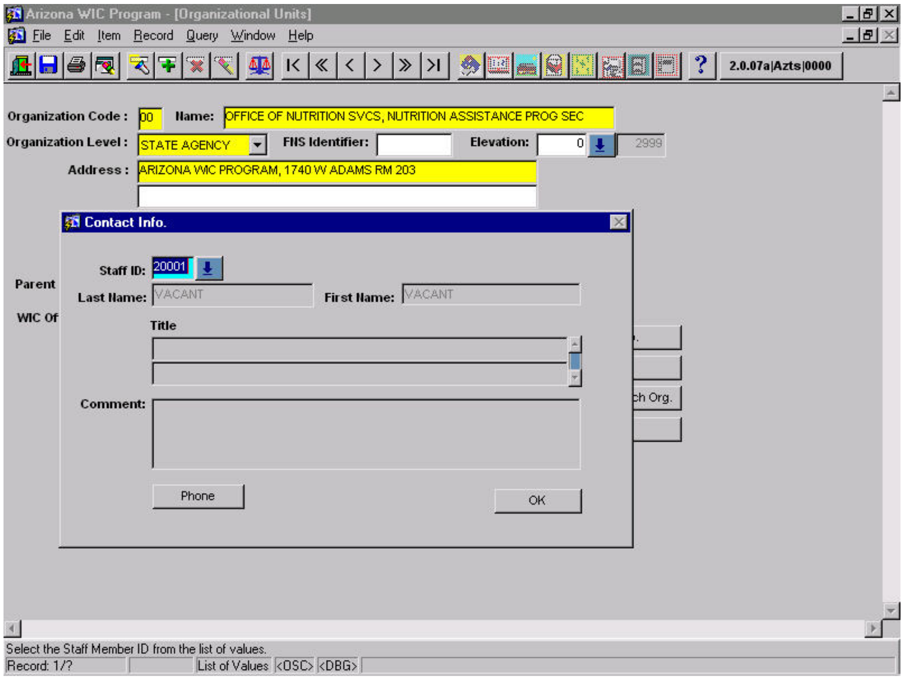


Figure 7 – Organizational Units (Contact Info Pop-Up)

10. Click on the list of values button next to the Staff ID field and double click on the staff member who will be the contact for this organizational unit. The system will automatically display the information. The phone push button will display the phone pop-up window as shown:

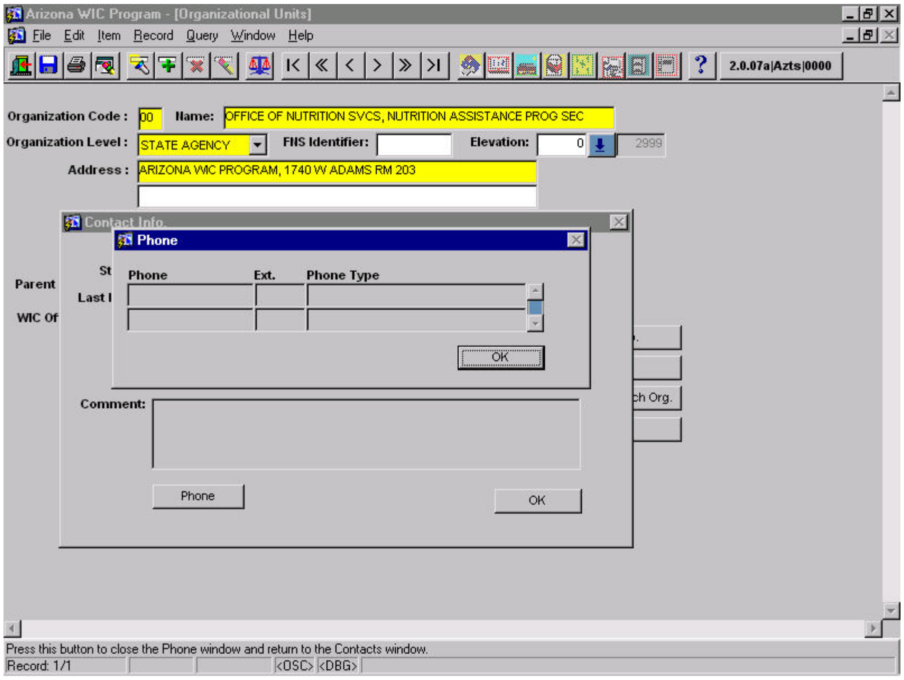


Figure 8 – Organizational Units (Contact Info – Phone Pop-up)

11. Click the OK button to return to the Contact Info. screen.
12. Click on the OK button to return to the Organizational Units screen.
13. Click on the Phone button and the pop-up box shown in below will be displayed. Enter the pertinent information for the organizational unit, then click on the OK button.

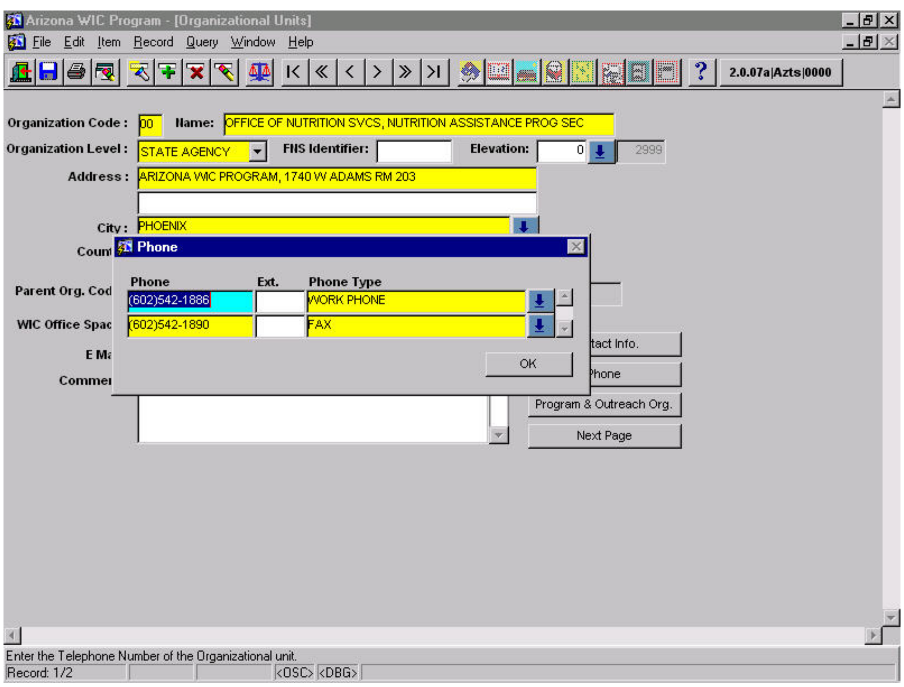


Figure 9 – Organizational Units (Phone Pop-Up)

14. Click on the Program & Outreach Org. button and the pop-up window shown in the Figure below will be displayed.

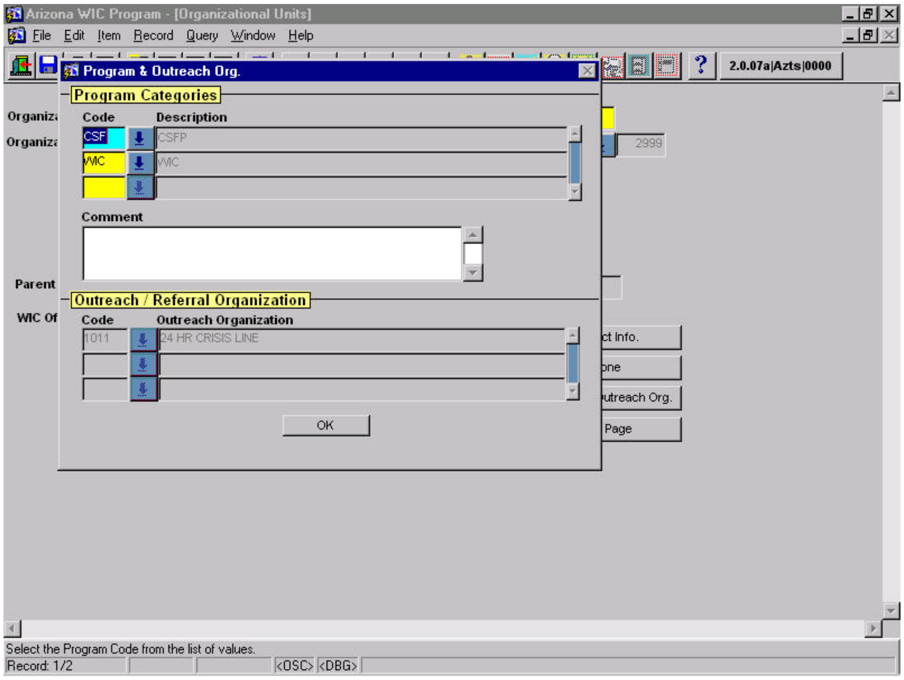


Figure 10 – Organizational Units (Program & Outreach/Referral Org. Pop-Up)

15. Under the Program Categories, click on the list of values button next to the Code field. Select the correct code from the list by double clicking on the desired line. The system will automatically display the corresponding Description information. Enter any optional comments in the Comment field.
16. Under the Outreach/Referral Organizations section use the Code LOV to select the Outreach/Referral Organization identification number. The Outreach/Referral Organization field is automatically populated once a code is entered. Click the OK button to close the pop-up.
17. Click the Next Page button and the Organizational Units – Figure 11 – Organizational Unit (Characteristics Pop-Up) is displayed. Information regarding the Organizational Unit is entered in this pop-up.

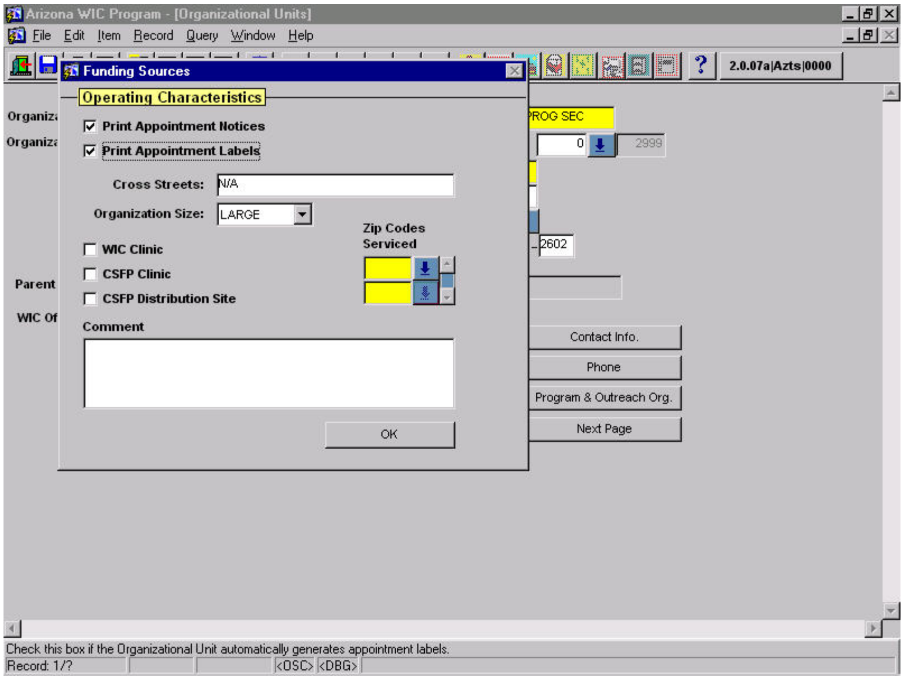


Figure 11 – Organizational Unit (Characteristics Pop-Up)

18. Check the appropriate check boxes if you want appointment notices and mailing labels produced during end of day process.
19. Enter the main cross streets nearest the clinic.
20. Use the LOV to select the appropriate size of the organizational unit.
21. Enter any optional comments in the Comment field.
22. Use the LOV to select the zip codes serviced by this organizational unit.
23. Check the appropriate check boxes to indicate if this organizational unit is a WIC clinic, CSFP clinic or a CSFP Distribution site.
24. Click on the OK button to return to the Organizational Units screen.
25. Upon completion of entry of all the new organizational unit information, click the Save icon. The system will indicate: “Transaction Completed”. Click the OK button.

Update an Organizational Unit

1. Click the Enter Query icon.
2. Enter the Organization Code or Name of the organizational unit to update, then press the F8 key. The system will display the information for the organization unit selected.
3. To perform an update, click once in the field to update and enter any new information, then click the Save icon. The Organizational Code, Organizational Level or the Food Package Prefix may not be updated. The system will indicate: “Transaction Completed.” Click on the OK button.

Delete an Organizational Unit

1. Click the Enter Query icon.
2. Enter the Organization Code or Name, then press the F8 key. The system will display the information for the organization unit to be deleted.
3. Verify that the information to be deleted is showing on the screen.
4. Click the Phone button.

5. Click once on a phone number and click the Remove Record icon. Repeat this procedure for each phone number listed. Upon removal all of the phone numbers, click on the OK button.
6. Click the Program & Outreach Org. button.
7. Click the Code field under the Program section and click the Remove Record icon. Repeat this process for each item under the Program section until removing them all. When they are all removed, click on the OK button.
8. Click the Code field under the Program section and click the Remove Record icon. Repeat this process for each item under the Program section until having removed them all. When they are removed, click the OK button.
9. Click the Save icon.
10. To delete an organizational unit, click the Organization Code field, then click the Remove Record icon.
11. Click the Save icon.

Note: Once an Organizational Unit has been used in the AIM System, it may not be deleted. These instructions are only for when Organizational Units are first established.

Figure 6 – Maintain Organizational Units

Fields

Organization Code - The organization's identification number. This field is mandatory and is user entered.
Name - The organization's name. This field is mandatory and is user entered.
Organization Level - Clicking on this drop down list allows the user to assign the organization level using the list that contains the values: STATE AGENCY, LOCAL AGENCY and CLINIC. This is mandatory and will default to LOCAL AGENCY.
FNS Identifier - The Food and Nutrition Services identification number. This field is mandatory.
Elevation - The elevation, in feet, above sea level of the organizational unit. This field is optional. The user is not required by the system, but should enter an elevtion for all clinics in order to facilitate CDC reporting requirements.
Address - The address of the organization. The first field is mandatory and the second is optional.
City - The city of the organization. This field can be entered in manually or the user can select a value from the list of values. Selection of a city will fill in the state and zip code. For more information, please refer to Window: Maintain Locales. This field is mandatory.
County - The county in which the organization is headquartered. This field is display only and will be populated when a city or zip code is selected.
State - The State of the organization. This field is display only and will be populated when a city or zip code is selected.
Zip Code - The zip code of the organization. This field can be entered in manually or the user can select a value from the list of values. Selection of a zip code will fill in the city and state. The additional four-digit code is user entered. For more information, please refer to Window: Maintain Zip Codes. The first field is mandatory and the second is optional.
Parent Org. Code - Clicking on the list of values button allows the user to select the parent organization. This will be disabled if the organization level is State Agency. If the organization

level is Local Agency, the list of values will contain the State Agency. If the organization level is Clinic, the list of values will contain all of the local agencies. This field is mandatory.
Name - The parent organization's name displayed when original code is selected.
WIC Office Space - The square feet of the office space allocated for the WIC program at the specific organization. This field is optional.
Measuring Unit - This field indicates how standard measurements are taken (English/Metric). This field is optional.
Food Package Prefix - Used to prefix the Food Package ID. Unique within each Local Agency. This field is system generated.
E-Mail - The organization's E-mail address. This field is optional.
Comment - The user may provide any comments or remarks. This field is optional.

Push Button(s)

Contact Info - Clicking on this button allows the user to enter contact information for an organizational unit.
Phone - Clicking on this button allows the user to enter phone information.
Program & Outreach Org. - Clicking on this button allows the user to assign the program and outreach organizations.
Next Page - Clicking on this button allows the user to enter Organizational Units- Characteristics information.

Figure 7 – Organizational Units (Contact Info Pop-Up)

Fields

Staff ID - The staff person's identification number. This field is mandatory and is filled from the list of values.
Last Name - The staff person's last name. This field is display only and is filled from the selection of a staff ID.
First Name - The staff person's first name. This field is display only and filled when a staff ID is selected.
Title - The contact's staff title is displayed here when the staff ID is selected.
Comment -Comments regarding the staff person. This field is display only and filled when a staff ID is selected.

Push Button(s)

Phone - Clicking this button allows the user to view phone information.
OK - Clicking this button closes the Contact push button window and returns the user to the Organizational Units Window.

Figure 8 – Organizational Units (Contact Info – Phone Pop-up)

Fields

Phone – The contact's phone number. This field is display only.
Ext. – The extension number if one exists. This field is display only.
Phone Type – The phone type corresponding to the number.

Push Buttons

OK – Clicking this button closes the Phone Pop-up.

Figure 9 – Organizational Units (Phone Pop-Up)

Fields

Phone - The organizational unit's phone number. This field is optional.
Ext. - The extension number if one exists. This field is optional.
Phone Type - The phone type corresponding to the number. This field is mandatory if a phone number is entered.

Push Button(s)

OK - Clicking this button closes the phone window.

Figure 10 – Organizational Units (Program & Outreach/Referral Org. Pop-Up)

Fields

Code - The program identification code. This field is mandatory and is selected from the list of values.
Description - The description for the program. This field is display only.
Comment - The user may provide any comments or remarks. This field is optional.
Code - The Outreach Referral Organization identification number. This field is display only and is filled in when a program is selected from the list of values.
Outreach Referral Organization - The Outreach Referral Organization name associated with the code. This field is display only and is filled when a program is selected from the list of values.

Push Button(s)

OK - Clicking on this button closes the Program and Outreach Org. window and returns the user to the Organizational Unit window.

Figure 11 – Organizational Unit (Characteristics Pop-Up

Fields

Cross Streets – User enters nearest cross streets to this organizational unit.
Organizational Size – Using the LOV user selects the appropriate size of the organizational unit.

Zip Codes Serviced – Using the LOV the user selects the zip codes serviced by this organizational unit.
Comments – The user may enter any additional comments or remarks in this free form note field.

Check Box(es)

Print Appointment Notices – If selected this organizational unit will have appointment notices printed during end of day process.
Print Appointment Labels – If selected this organizational unit will have appointment address labels printed during end of day process.
WIC Clinic – If selected this organizational unit will be designated as a WIC clinic.
CSFP Clinic – If selected this organizational unit will be designated as a CSFP clinic.
CSFP Distribution Site – If selected this organizational unit will be designated as a distribution site for CSFP.

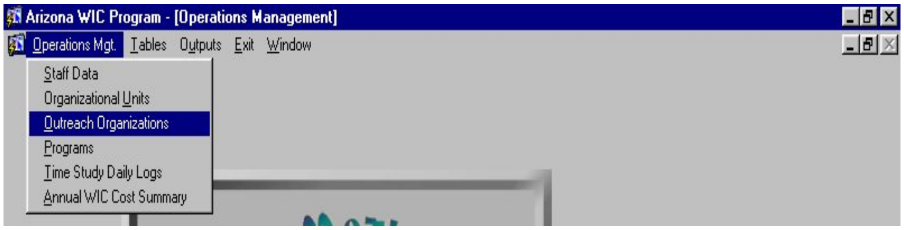
Push Button(s)

OK - Clicking this button closes the funding sources window and returns the user to Organizational Units.

Maintain Outreach/Referral Organizations

To Maintain Outreach/Referral Organizations:

1. Click on Operations Mgt. from the menu bar.
2. Click on Outreach Organizations as shown below:



The Outreach/Referral Organizations Window is displayed:

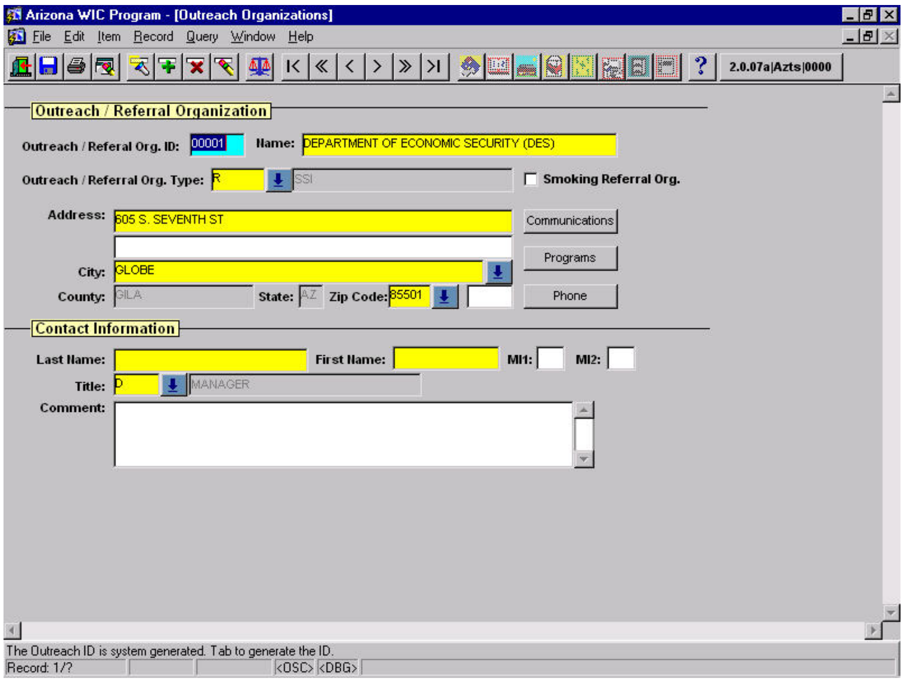


Figure 12 – Maintain Outreach/ReferralOrganizations

Add an Outreach/Referral Organization

1. TAB off the Outreach/Referral Org. ID and the system will generate an ID number for the new Outreach/Referral organization.
2. Enter in the name of the new Outreach/Referral organization in the Name field.
3. Click on the list of values button next to the Outreach/Referral Org. Type field and select the correct description for the new organization by double clicking on that description.
4. Enter the address information for the new organization, and click on the list of values button next to the City field. Select the line with the correct city by double clicking on it. The system will automatically display the County, State and Zip Code information.

5. Under the Contact Information section, enter the name of the contact at the new Outreach/Referral Organization. At the Title field, click on the list of values button and select the title description that best describes the new contact. Enter Comments as needed.
6. After entering the Contact Information, click on the Communications button to record correspondence with the new Outreach/Referral Organization. The pop-up box shown in below will be displayed:

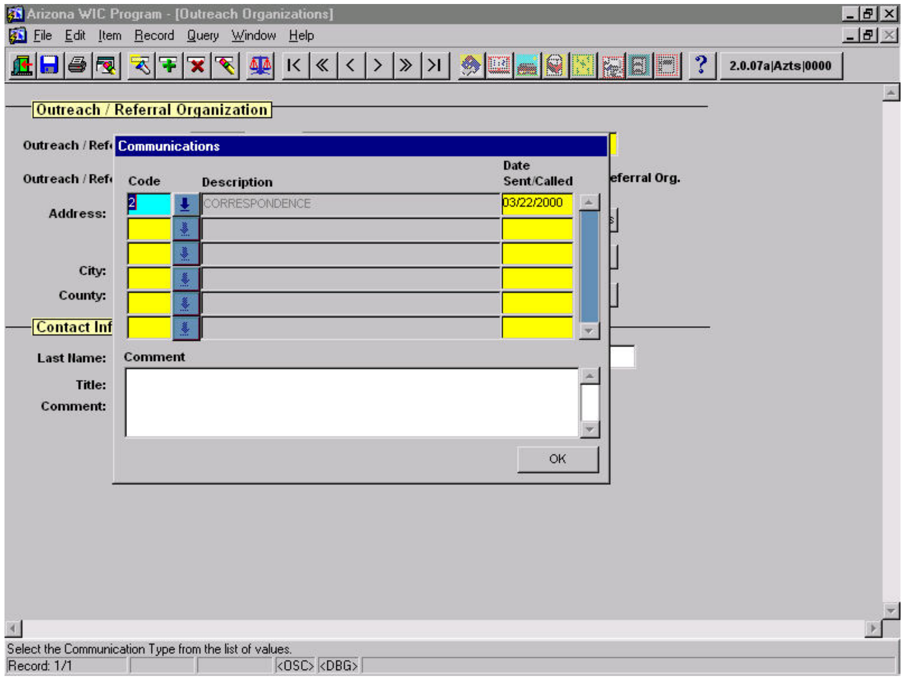


Figure 13 – Maintain Outreach/Referral Organizations (Communications Pop-Up)

7. Click the list of values button next to the ID field, then double click on the line that matches the form of communication to record. Enter the Date Sent/Called relating to the communication.
8. Enter applicable comments.

Note: Only one of a given communication type is allowed on a given day, and if multiple communications of the same type are done on the same day, then record them in the comment field.

9. Click on the OK button to return to the Outreach/Referral Organization screen.
10. Next, click the Programs button and the pop-up box shown in below will be displayed:

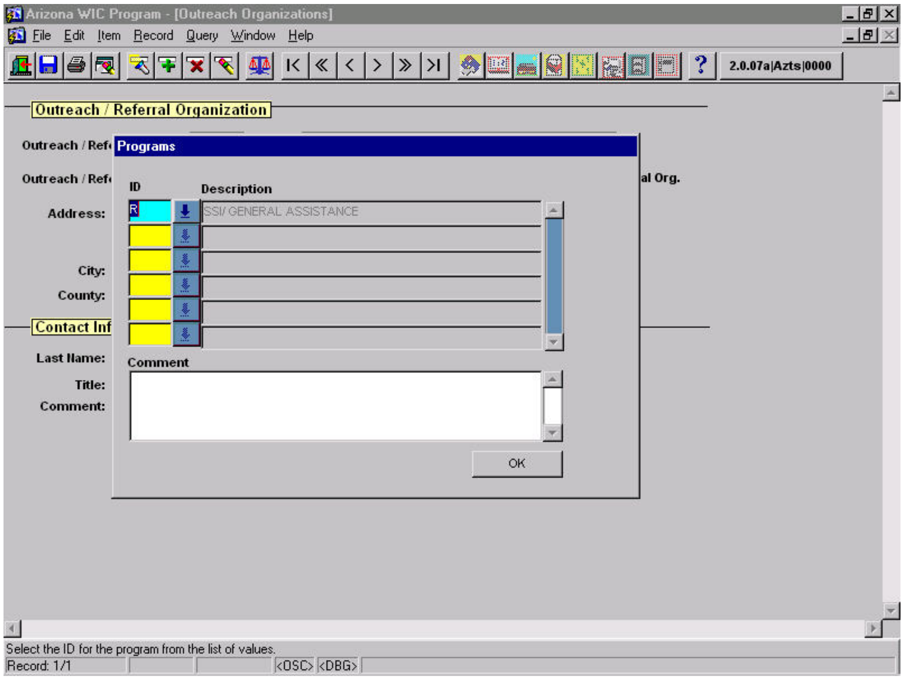


Figure 14 – Maintain Outreach/Referral Organizations (Programs Pop-Up)

11. Click on the list of values button next to the ID field and double click on the correct line for the new program. Enter optional Comments. Repeat as needed to enter all programs.
12. Click the OK button to return to the Outreach/Referral Organization screen.
13. Next, click on the Phone button and the pop-up box shown in below will be displayed:

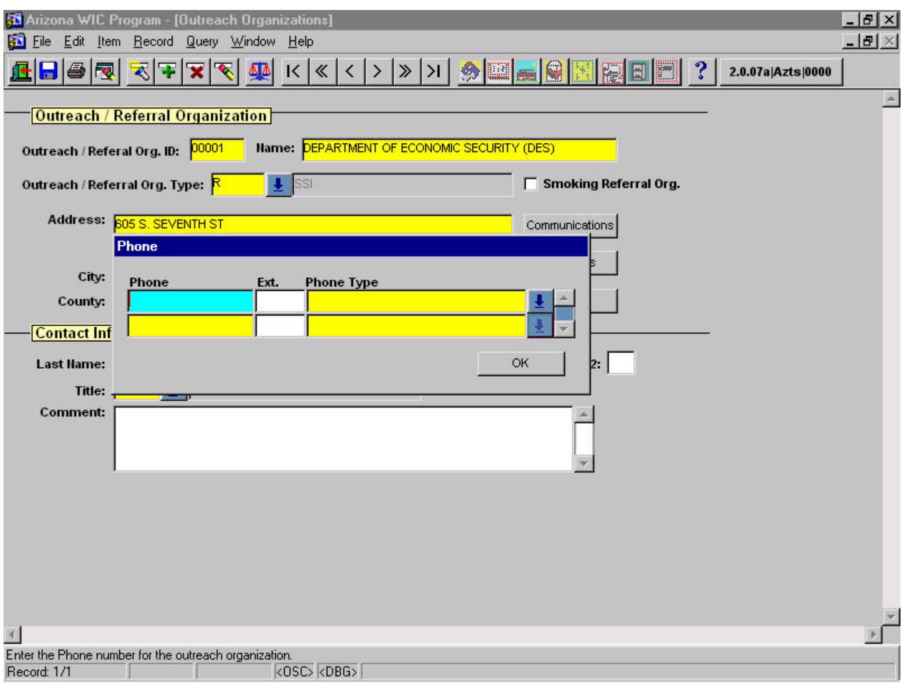


Figure 15 – Maintain Outreach/Referral Organizations (Phone Pop-Up)

14. Enter the Phone information for the new Outreach/Referral Organization, then click the OK button to return to the Outreach/Referral Organization screen.

15. After all the information above has been entered, click the Save icon. The system will indicate: “Transaction Completed.” Click on the OK button.

Update an Outreach/Referral Organization

1. Click the Enter Query icon.
2. Type either the Outreach/Referral ID or Name for the Outreach/Referral Organization to update in the corresponding field, then press the F8 key. The system will display the organization’s information.
3. Verify that the information on the screen matches the Outreach/Referral Organization to be updated.
4. To perform an update, click once in the field to be updated and enter any new information. The Outreach/Referral ID may not be updated. Click the Save icon. The system will indicate: “Transaction Completed.” Click on the OK button.

Delete an Outreach/Referral Organization

1. Click the Enter Query icon
2. Enter either the Outreach/Referral ID or Name for the organization to be deleted in the corresponding fields, then press the F8 key. The system will automatically populate the fields with the Outreach/Referral Organization information.
3. Click the Communications button. When the Communications pop-up window is displayed, delete the communications records, then click OK.
4. Click the Programs button. When the Programs pop-up window is displayed, delete the program records, then click OK.
5. Click the Phone button. When the Phone pop-up window is displayed, delete the phone records, then click OK.
6. Click the Save icon. The system will display the message “Transaction Completed.” Click OK.
7. Click on the Outreach/Referral Org ID field, then click the Remove Record icon and the system will clear the Outreach/Referral Organization information from the screen.
8. Click the Save icon. The system will display the message “Transaction Completed.” Click OK.

Note: Once an Outreach/Referral organization has been used in the AIM system, it may not be deleted. These instructions are only for when the organization is first established.

Figure 12 – Maintain Outreach/ReferralOrganizations

Fields

Outreach/Referral Org. ID - The Outreach/Referral organization’s identification number. This field is mandatory and is user-entered.
Name - The Outreach/Referral organization’s name. This field is mandatory and is user-entered.
Outreach/Referral Org. Type - Clicking on the list of values button allows the user to assign the Outreach/Referral type. For more information, please refer to Window: Maintain Outreach/Referral Organization Types. This field is mandatory.
Address - The Outreach/Referral organization’s address. This field is mandatory while the second line is optional.

City - The Outreach/Referral organization's city. This field can be entered manually or the user can select a value from the list of values. Selection of a city will fill in the state and zip code. For more information, please refer to Window: Maintain Locales. This field is mandatory.
County - The Outreach/Referral organization's county. This field is display only and will be populated when a city or zip code is selected.
State - The Outreach/Referral organization's state. This field is display only and will be populated when a city or zip code is selected.
Zip Code - The Outreach/Referral organization's zip code. This field can be entered in manually or the user can select a value from the list of values. Selection of a zip code will fill in the city and state. The additional four digit code is user entered. For more information, please refer to Window: Maintain Zip Codes. The first field is mandatory and the second is optional.
Last Name - The Outreach/Referral organization contact's last name. This field is mandatory.
First Name - The Outreach/Referral organization contact's first name. This field is mandatory.
MI1 - The Outreach/Referral organization contact's middle initial. This field is optional.
MI2 - The Outreach/Referral organization contract's second middle initial. This field is optional.
Title - The contact's title at the Outreach/Referral organization. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Push Button(s)

Communications - Clicking this button displays the Communications pop-up window.
Programs - Clicking on this button displays the Programs pop-up window.
Phone - Clicking on this button displays the Phone pop-up window.

Figure 13 – Maintain Outreach/Referral Organizations (Communications Pop-Up)

Fields

Code - The code of the communication type. This field is mandatory and selected from the list of values.
Description - The description of the communication will be filled in when ID is selected. This is display only.
Date Sent/Called - The date when the communication occurred. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Push Button(s)

OK - Clicking this button returns the user to the Outreach/Referral Organization screen.

Figure 14 – Maintain Outreach/Referral Organizations (Programs Pop-Up)

Fields

ID - Code for the program. This field is mandatory and selected from the list of values.
Description - Name of the program associated with the value in the Code field. This field is display only.
Comment - The user may provide any comments or remarks. This field is optional.

Push Button(s)

OK - Clicking this button returns the user to the Outreach/Referral Organization screen.

Figure 15 – Maintain Outreach/Referral Organizations (Phone Pop-Up)

Phone - The Outreach/Referral organization's phone number. This field is optional.
Ext. - The extension number, if applicable. This field is optional.
Phone Type - The type of telecommunications device this number represents. This field is mandatory if phone number is entered.

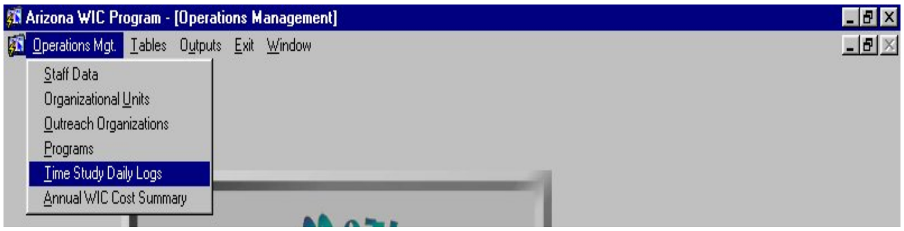
Push Button(s)

OK - Clicking this button returns the user to the Outreach/Referral Organization screen.

Maintain Time Study Daily Log

To Maintain Time Study Daily Log:

1. Click on Operations Mgt. from the menu bar.
2. Click on Time Study Daily Logs as shown below:



The Time Study Daily Log Window is displayed:

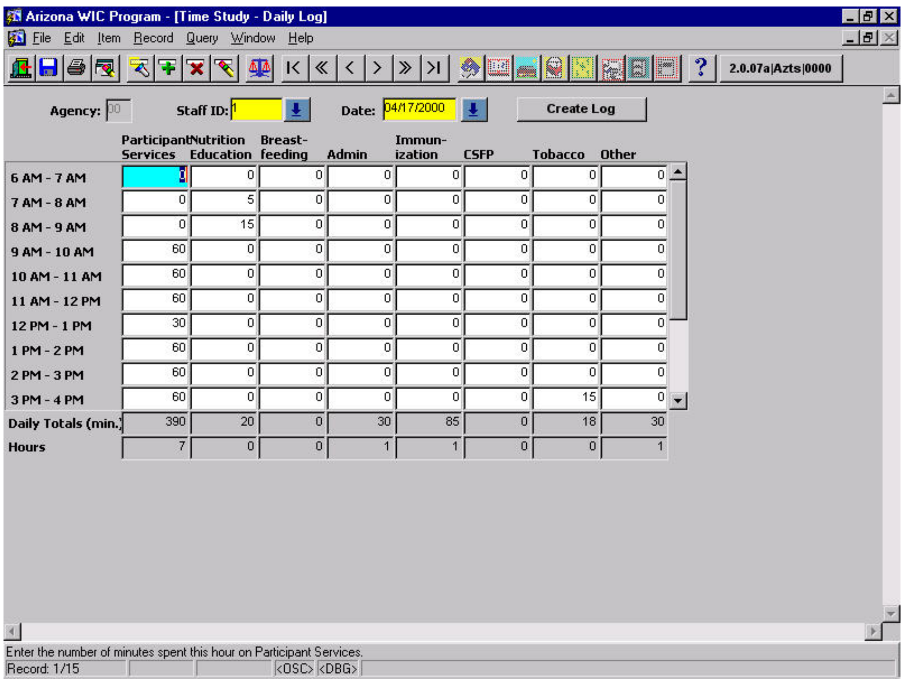


Figure 16 – Time Study – Daily Log

Add a Time Study Daily Log

1. The Agency field displays the Organizational Code of the agency to which the user is logged on.
2. Click on the list of values button next to the Staff ID field and select the staff member for which the log will be created. Only those users with Time Study Supervisor authorization are allowed to select other staff member ID's, otherwise the user may only select their own.
3. Click on the list of values button next to the Date field and select the day for which the Time Study activity data was collected.
4. Click the Create Log push button to generate a blank Log form.
5. In the Minutes Spent on Activities section of the Time Study Log, click or TAB to each of the appropriate Time Slot hours and enter in the number of minutes the staff member spent on

each activity. The total minutes entered for each time slot should not exceed an hour or 60 minutes.

6. The AIM system calculates the Daily Totals and Hours for each activity as the user enters in the information.
7. After all the information above has been entered, click the Save icon. The system will indicate: “Transaction Completed.” Click on the OK button.

Update a Time Study Daily Log

1. Click on the list of values button next to the Staff ID field and select the staff member for which the log will be update.
2. Click on the list of values button next to the Date field and select the log date that will be updated.
3. Click the Query icon and the system will display the Time Study Log data.
4. To perform an update, click once in the field to be updated and enter any new information.
5. The AIM system will recalculate the Daily Totals and Hours for each activity as the user enters the new information.
6. Once the Time Study Daily Log has been updated. Click the Save icon. The system will indicate: “Transaction Completed.” Click on the OK button.

Fields

Agency - The system displays the Organization Code of the Agency the user logged into on the Logon screen. This field is display only.
Staff ID – The staff member ID number from the Agency the user is logged into. Users without the Time Study Supervisor check box checked off in the Systems Administration Security screen will have their ID number appear in the Staff ID field when they enter this screen. They will not be able to view the Daily Log for other staff members in their agency. **This field is mandatory for users with the Time Study Supervisor privilege and display only for those users without it.**
Date – The date that the activity information below is being entered for. This field is mandatory.
Participant Services - The number of minutes during the corresponding Time Slot hour that was spent performing face to face services to participants, other than Nutrition Ed, B/F, CSFP, etc. (i.e., explain WIC rules, phone calls to participants, referrals, note taking, and also travel time to/from remote clinics to perform participant services). This field is optional.
Nutrition Education - The number of minutes during the corresponding hour (shown in Time Slot column) that was spent performing group or individual nutrition education services, which includes travel time to/from remote clinics to perform Nutrition Education services. This field is optional.
Breastfeeding - The number of minutes during the corresponding hour (shown in Time Slot column) that was spent performing B/F related services to participants. Includes travel time to/from remote clinics to provide B/F services. This field is optional.
Admin - The number of minutes during the corresponding hour (shown in Time Slot column) that was spent performing filing, meetings, clinic staff training, supply orders, policy & procedure issues, etc. This field is optional.
Immunization - The number of minutes during the corresponding hour (shown in Time Slot column) that was spent performing services related to Immunization. This field is optional.
CSFP - The number of minutes during the corresponding hour (shown in the time Slot column) that was spent performing services related to CSFP including referrals. This field is optional.

Tobacco - The number of minutes during the corresponding hour (shown in Time Slot column) that was spent performing services related to Tobacco Intervention. This field is optional.
Other - The number of minutes during the corresponding hour (shown in Time Slot column) that was spent performing activities. This field is optional.
Daily Totals (min) - The number of minutes spent performing the activity shown at the top of the column. This field is calculated by the system.
Hours - The total number of hours spent performing the activity shown at the top of the column. This field is calculated by the system.

Push Button(s)

Create Log – Clicking this button generates a new blank log for the date and staff member selected.

Calculation(s)

Daily Totals (min) – Sum of the values in each corresponding column for the Time Slots from 6am to 9pm.
Hours - Dividing the value in the corresponding Daily Total (min) field by 60.

Maintain Annual WIC Cost Summary

To Maintain Annual WIC Cost Summary:

1. Click on Operations Mgt. from the menu bar.
2. Click on Annual WIC Cost Summary as shown below:

The Annual WIC Cost Summary Window is displayed:

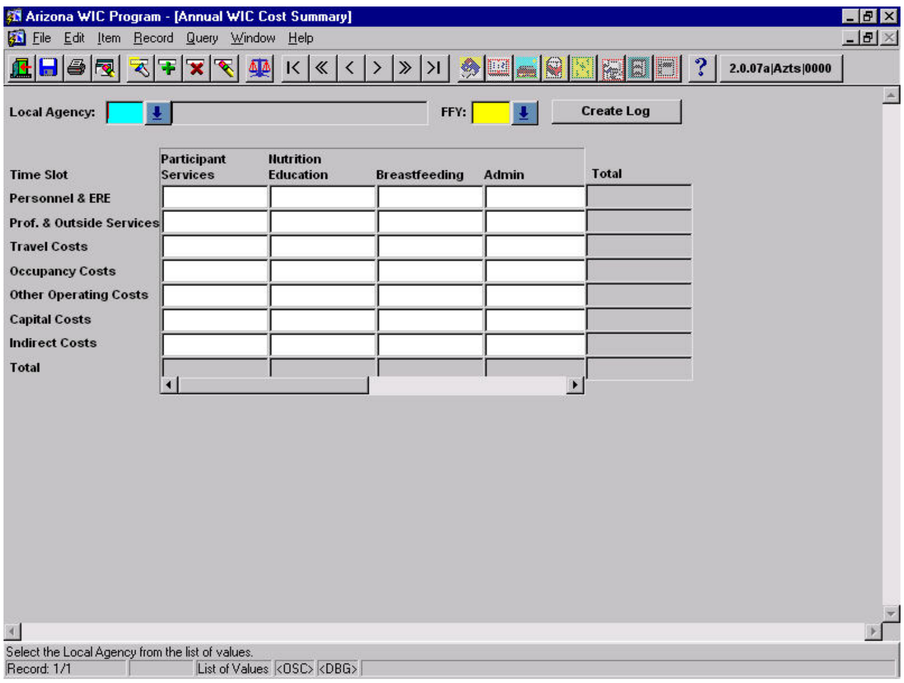


Figure 17 – Annual WIC Cost Summary

Add an Annual WIC Cost Summary

1. Click on the list of values button next to the Local Agency field and select the agency for which the Annual WIC Cost Summary budget information is being entered. The local agency(s) available for selection is based on the user is logged on.
2. Click on the list of values button next to the Fiscal Year field and select the fiscal year for which the budget information is being entered.
3. Click the Create Log push button to generate a new Annual WIC Cost Summary form.
4. Once the Create Log push button is clicked, the AIM system calculates the Time Slot category, Personnel and ERE values for each activity category by using the accumulated information entered in the Time Study- Daily Log window.

5. In the new Annual WIC Cost Summary Log, click or TAB to each of the appropriate Time Slot budget categories and enter in the appropriate dollar amounts expended on each activity.
6. The AIM system calculates the Totals for each Time Slot Budget category and activity as the user enters in the activity amounts.
7. After all the information above has been entered, click the Save icon. The system will indicate: “Transaction Completed.” Click on the OK button.

Note: The AIM System will only allow each Local Agency to have one Annual WIC Cost Study per Fiscal Year.

Update an Annual WIC Cost Summary

1. Click on the list of values button next to the Local Agency field and select the agency for which the log will be updated.
2. Click on the list of values button next to the Fiscal Year field and select the fiscal year that will be updated.
3. Click the Query icon and the system will display the Annual WIC Cost Summary information.
4. To perform an update, click once in the field to be updated and enter any new information.
5. The AIM system will recalculate the Totals for each Budget category and activity as the user enters the new information.
6. Once the Annual WIC Cost Summary has been updated. Click the Save icon. The system will indicate: “Transaction Completed.” Click on the OK button.

Fields

Local Agency - The Local Agency name. This field is mandatory.
Fiscal Year - The Fiscal Year that the budget information is being entered for. This field is mandatory.
Personnel & ERE - The information entered in the Time Study - Daily Log by the Local Agency staff to determine the values populated in this field for each category. This field is system generated.
Professional & Outside Services - The number of dollars expended for Professional & Outside Services in each of the activity categories shown at the top of each column. This field is optional.
Travel Costs - The number of dollars expended for Travel in each of the activity categories shown at the top of each column. This field is optional.
Occupancy Costs - The number of dollars expended for Occupancy Costs in each of the activity categories shown at the top of each column. This field is optional.
Other Operating Costs - The number of dollars expended for Other Operating Costs in each of the activity categories shown at the top of each column. This field is optional.
Capital Costs - The number of dollars expended for Capital Costs in each of the activity categories shown at the top of each column. This field is optional.
Indirect Costs - The number of dollars expended for Indirect Costs in each of the activity categories shown at the top of each column. This field is optional.
Total (Time Slot) - The system displays the total number of dollar spent on each of the activity categories in that local agency for the fiscal year shown.
Total (of Rows) - The system displays the total dollar amount for the dollar values entered in each row.

Push Button(s)

Create Log – Click to generate a new Annual WIC Cost Summary Log.

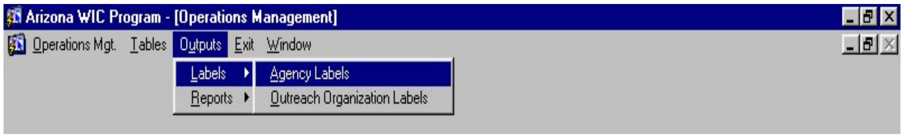
Calculation(s)

Personnel and ERE - For each activity category the system calculates using the information entered in the Time Study Daily Log window, the total salary and benefit dollars spent on that activity for each local agency employee (Hourly Salary X # of hrs spent performing that activity type X the FTE rate). Next the ERE cost for that activity is calculated (total salary and benefit dollars spent performing that activity X ERE %). The system then adds these two results together for each staff member in the Local Agency. Finally, the system totals the Personnel & ERE cost for all staff members in a Local Agency for an activity and displays the total in the appropriate column in the Personnel and ERE row.
Total (Time Slot) – Sum of the costs in each column on the screen and displays the dollar value in the bottom row.
Total (of Rows) – Sum of the cost values in each field in a budget category row and displays that total in the total column to the right of each row.

Creating Agency Mailing Labels

To Create Agency Mailing Labels:

1. Click Outputs on the Operations Management main menu.
2. Click Labels. The sub-menu is displayed.
3. Click Agency Labels as shown below:



The Agency Mailing Labels parameter window is displayed:

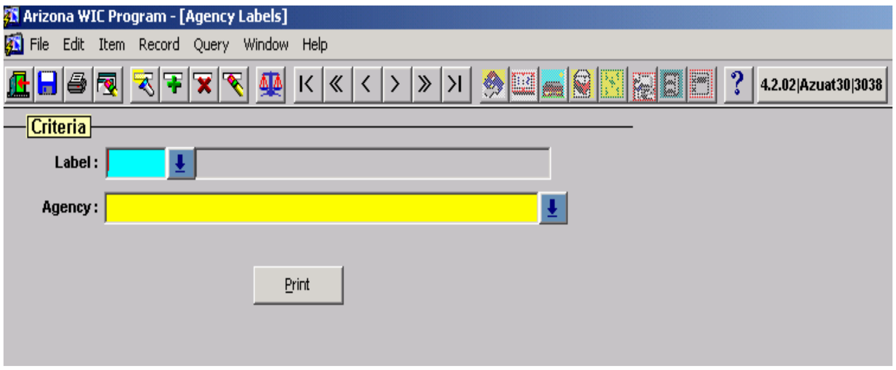
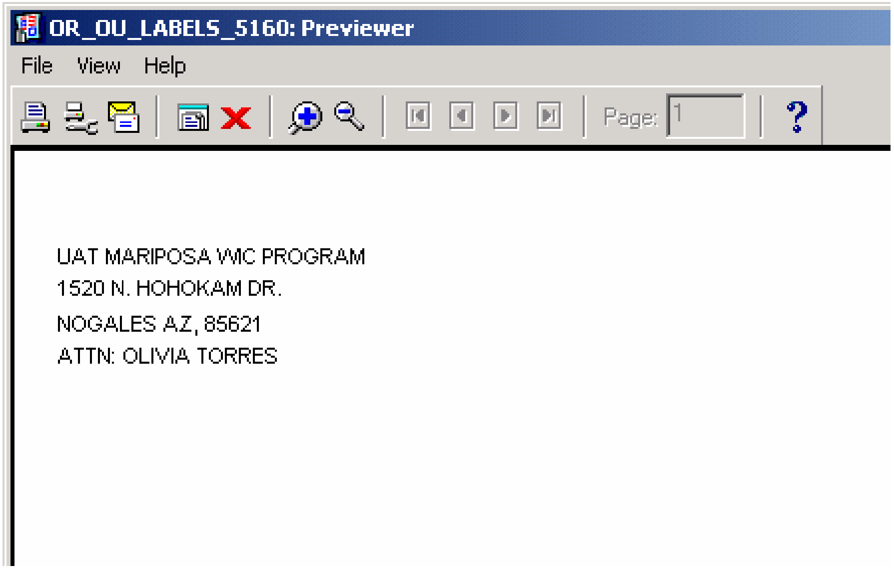


Figure 18 - Agency Mailing Labels

Create Agency Mailing Labels

1. Click on the drop down button to the right of the 'Label' field to select the appropriate mailing label.
2. Click on the drop down button to the right of the 'Agency' field to select the desired agency.
3. After the desired choices have been made click on the 'Print' button to generate the mailing labels.
4. User is given the option of choosing which label position to begin with. Selecting '1' prints from the first label in the sheet to the last.



Sample of Agency Mailing Labels

8. Click the Previous, Next, First, Last and Page icons at the top of the window to move forward and backward through the report pages.
9. Click the Print icon to print the report.
10. Click the Close icon to exit the preview window and return to the Operations Management main menu.
11. Click the New icon to view a new copy of the same preview window.

Error! Reference source not found.

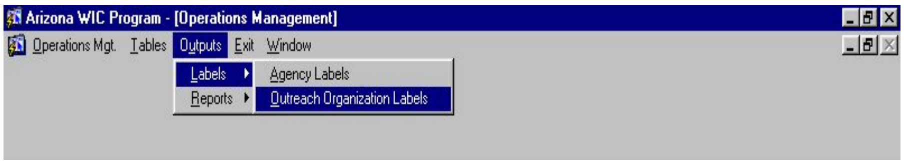
Fields

Label - Offers a choice of Avery printer labels: 5160 – HP 3x10 and 5163 HP 2x5
Agency - The user may select the identification number of the organizational unit for which the mailing labels are generated.

Creating Outreach Organization Mailing Labels

To Create Outreach/Referral Organization Mailing Labels:

1. Click Outputs on the Operations Management main menu.
2. Click Labels. The sub-menu is displayed.
3. Click Outreach Organization Labels as shown below:



The Outreach Organization Labels parameter window is displayed:

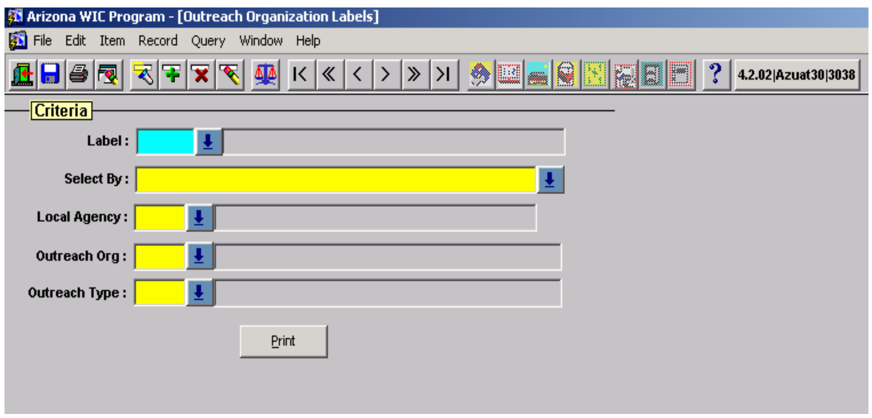


Figure 19 - Outreach Organization Mailing Labels

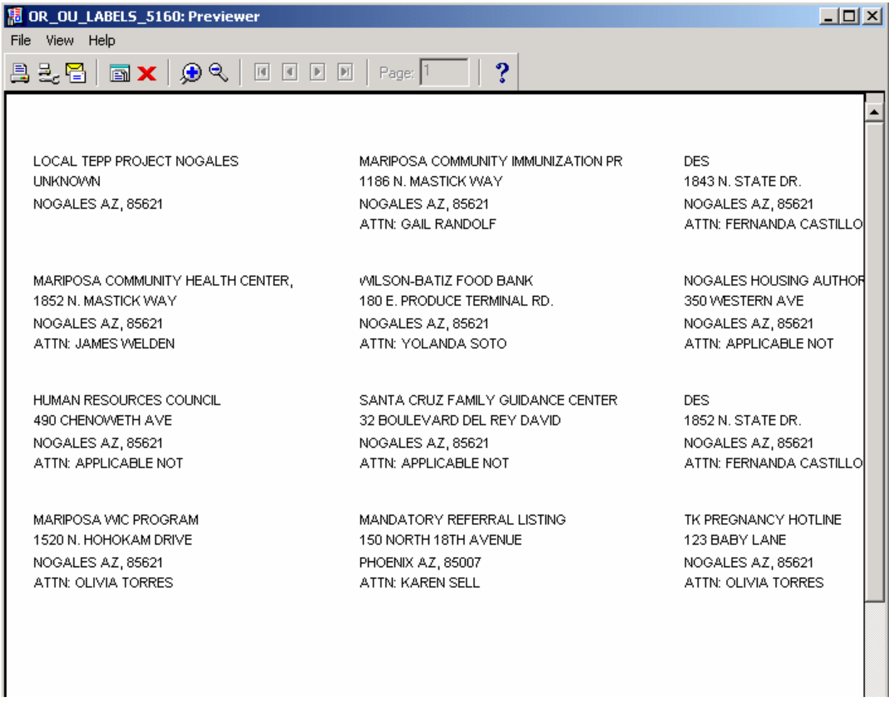
Produce Outreach Organization Mailing Labels

1. Click on the drop down button to the right of the 'Label' field to select the appropriate mailing label.
2. Click on the drop down button to the right of the 'Select By' field to select for which factor mailing labels are to be produced.
3. Click on the drop down button to the right of the field corresponding to the choice populated in the Select By field, (e.g. if Select By field is Outreach ID, TAB to the Outreach ID field.), to select the properties for the report.

Note: Only one factor per report may be selected.

4. After the desired choices have been made click on the 'Print' button to generate the mailing labels.
5. User is given the option of choosing which label position to begin with. Selecting '1' prints from the first label in the sheet to the last.

The following message will be presented giving instruction to the user to close any open Reports Background Engines before generated mailing labels: "Be Sure To Close Any Reports Background Engine(s) (right-click on the taskbar at the bottom of the screen) Before Printing Labels."



Sample of Outreach Organization Mailing Labels

7. Click the Previous, Next, First, Last and Page icons at the top of the window to move forward and backward through the report pages.
8. Click the Print icon to print the report.
9. Click the Close icon to exit the preview window and return to the Operations Management main menu.
10. Click the New icon to view a new copy of the same preview window.

Error! Reference source not found.

Fields

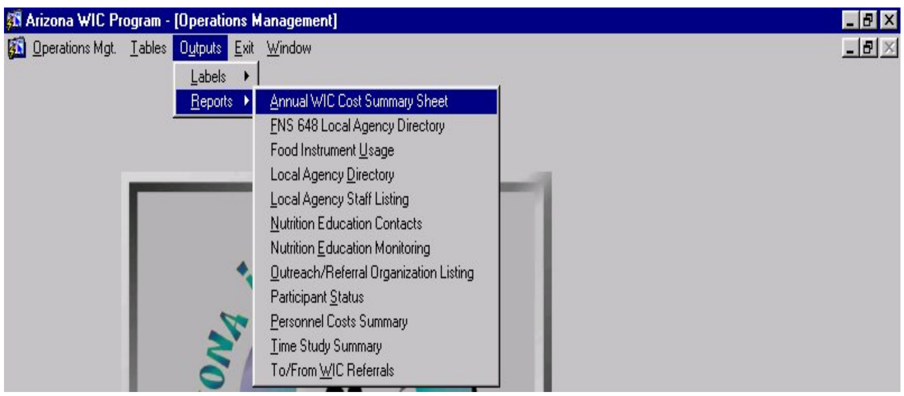
Label - Offers a choice of Avery printer labels: 5160 – HP 3x10 and 5163 HP 2x5
Select By - Click this drop-down list to select mailing labels produced based upon one of three areas: Local Agency, Outreach ORG or Outreach Type.
Local Agency - The user may select the identification number of the organizational unit for which the labels are generated. This field is mandatory if the chosen 'Select By' criterion is Local Agency.
Outreach ORG - The user may select the identification number of the outreach organizational unit for which the mailing labels generated. This field is mandatory if the chosen 'Select By' criterion is Outreach ORG.
Outreach Type - The user may select the type of organizational unit for which mailing labels are generated. This field is mandatory if the chosen 'Select By' criterion is Outreach Type.

Producing a Annual WIC Cost Summary Sheet Report

This report is generated once all the necessary information has been entered into the Annual WIC Cost Summary window. The report will display the cost data entered and the system calculated totals for the selected agency(s) and Fiscal Year. The report includes a signature and date line for the Program Director along with the address and instructions to mail the report to the WIC Manger.

To Produce a Annual WIC Cost Summary Sheet Report:

1. Click on Outputs from the menu bar.
2. Position the Cursor on Reports, the reports sub-menu is displayed.
3. Click on Annual WIC Cost Summary Sheet as shown below:



The Annual WIC Cost Summary Sheet Window is displayed:

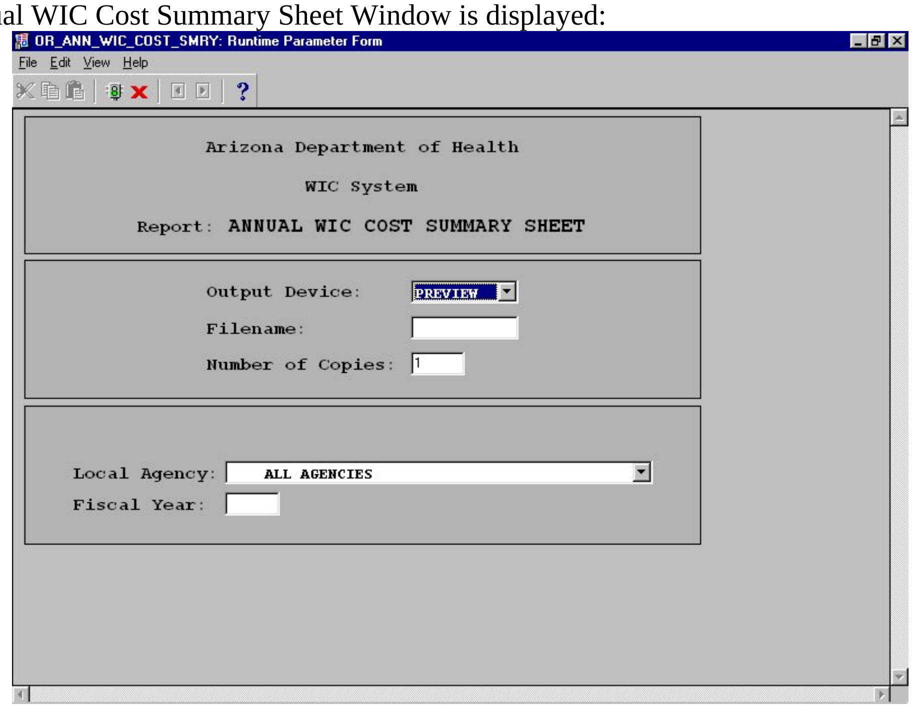
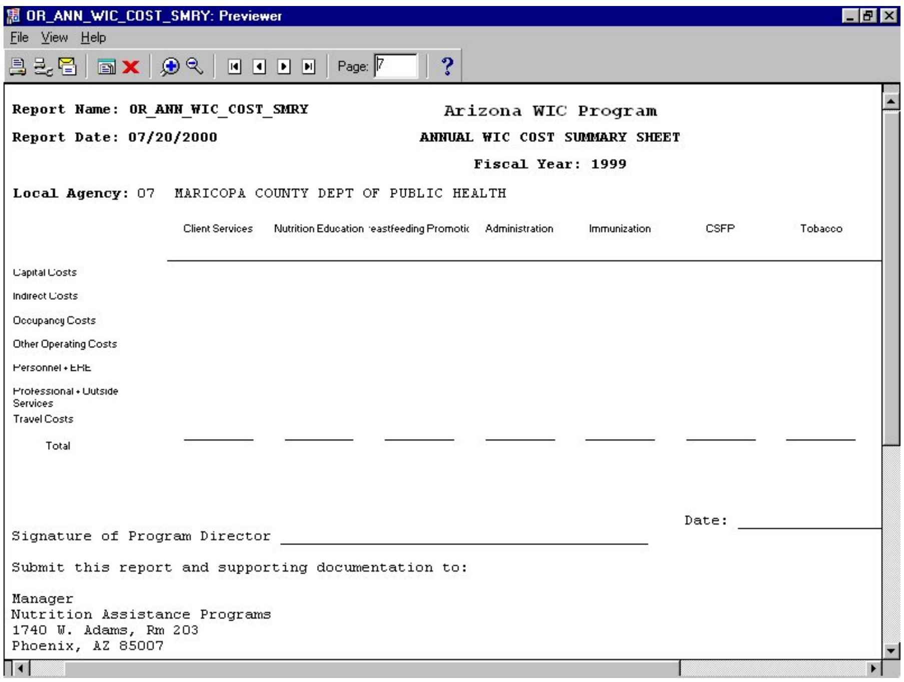


Figure 20 – Annual WIC Cost Summary Sheet

Produce a Annual WIC Cost Summary Sheet Report

1. Click the list of values button for the Output Device field and select the output device to send the report to by double clicking on that device.
2. If “File” is selected as the Output Device, TAB to the Filename field. Enter the filename of the report being generated.
3. TAB to the Number of Copies field. Type in the number of report copies desired in this field.
4. Click the list of values button for the Local Agency field and select either All Agencies or a single Agency for which the report will be generated. The available Agencies displayed will be based on the users log on.
5. TAB to Fiscal Year field and enter in the desired Fiscal Year for which the report will be generated.
6. After the information has been entered, click the green light icon.



Sample of Annual WIC Cost Summary Sheet Report

1. Click the Previous, Next, First, Last, and Page icons at the top of the screen to move forward and backward through the report pages.
2. Click the Print icon to print the report. To activate the system’s E-mail capabilities, click the Mail icon.
3. Click the Close icon to exit the preview screen and return to the Operations Management Menu Screen. Click the New icon to view a new copy of the preview screen.

Fields

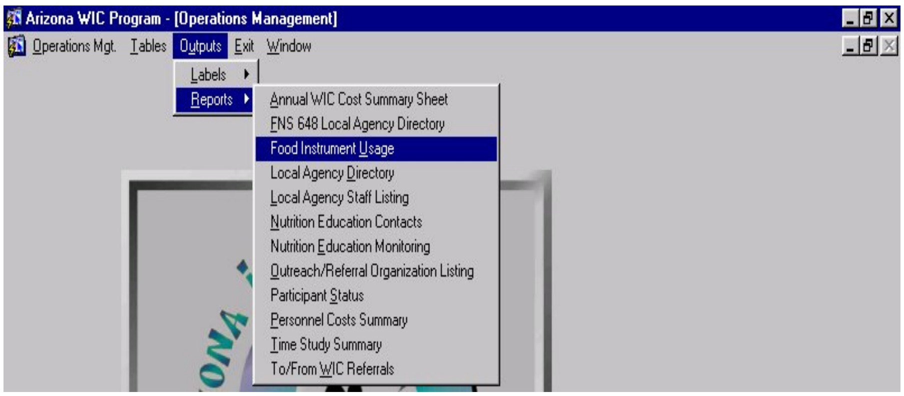
Output Device - Select whether to print, review, create a file or mail this document.
Filename - Select a file name of where to send in case a file is wanted.
Number of Copies - Select number of copies to print.
Local Agency- Select the desired agency.
Fiscal Year – Enter the desired fiscal year.

Producing a Food Instrument Usage Report

This report displays a list of the number of food instruments with each type of disposition and sorted by Local and State Agency based the user entered date range. Each voided disposition is listed separately with a total for all voided typed. This report also appears with the same name in the Financial Management module.

To Produce a Food Instrument Usage Report:

1. Click on Outputs from the menu bar.
2. Position the Cursor on Reports, the reports sub-menu is displayed.
3. Click on Food Instrument Usage as shown below:



The Food Instrument Usage Window is displayed:

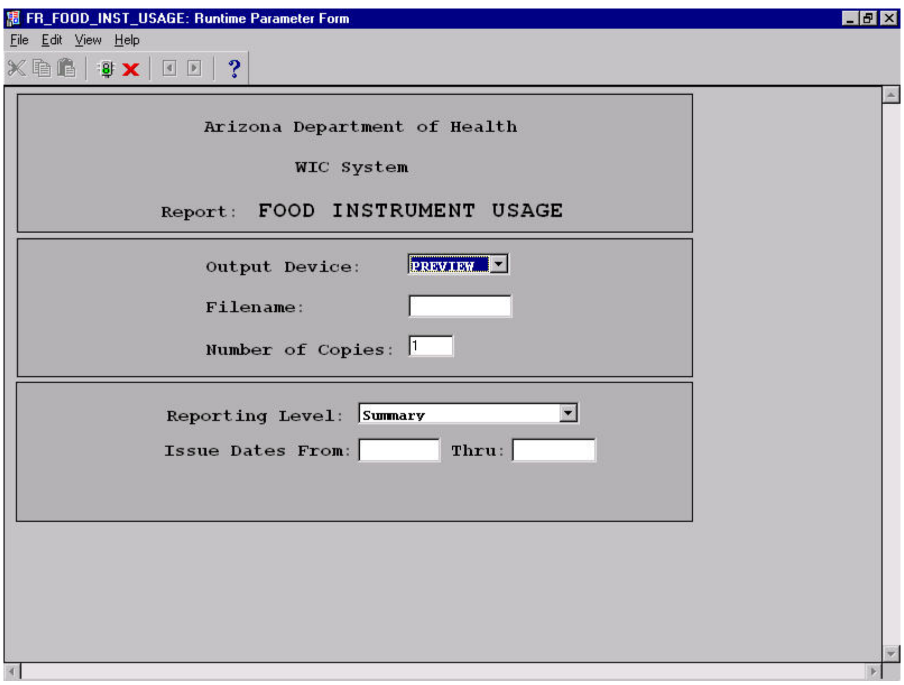
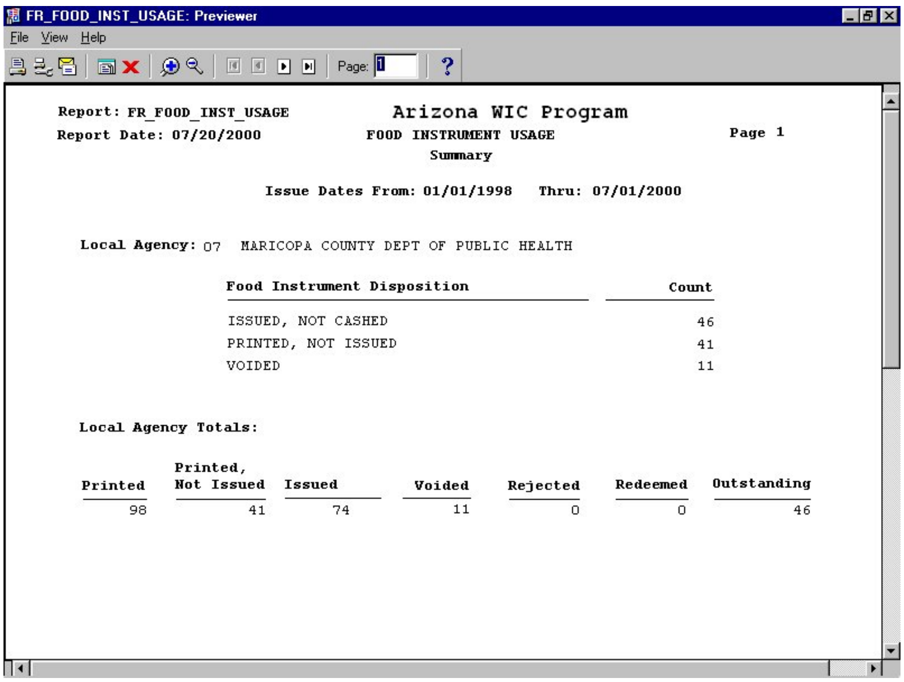


Figure 21 – Food Instrument Usage

Produce a Food Instrument Usage Report

1. Click the list of values button for the Output Device field and select the output device to send the report to by double clicking on that device.
2. If “File” is selected as the Output Device, TAB to the Filename field. Enter the filename of the report being generated.
3. TAB to the Number of Copies field. Type in the number of report copies desired in this field.
4. Click the list of values button for the Report Level field and select the level for which the report will be generated.
5. TAB to Issue Dates From field and enter in the desired date that the report is to start querying from.
6. TAB to Thru field and enter in the desired date that the report is to stop querying.
7. After the information has been entered, click the green light icon.



Sample of Food Instrument Usage Report

1. Click the Previous, Next, First, Last, and Page icons at the top of the screen to move forward and backward through the report pages.
2. Click the Print icon to print the report. To activate the system’s E-mail capabilities, click the Mail icon.
3. Click the Close icon to exit the preview screen and return to the Operations Management Menu Screen. Click the New icon to view a new copy of the preview screen.

Fields

Output Device - Select whether to print, review, create a file or mail this document.
Filename - Select a file name of where to send in case a file is wanted.
Number of Copies - Select number of copies to print.
Report Level- Select the desired report level of either Summary or Detail.

Issue Date From – Enter the earliest date the report will start.
Thru – Enter the latest date the report will stop.

Calculation(s)

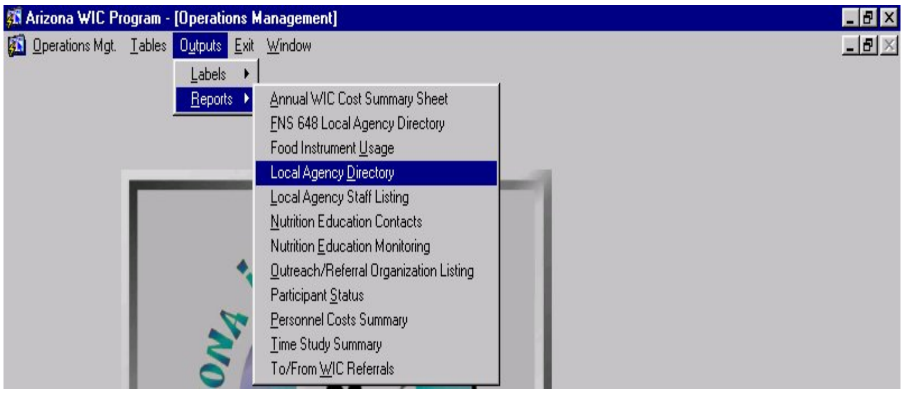
Count - Count (FI Disposition)
Printed - Count(FI's)
Printed, Not Issued - Count(FI's not issued)
Issued - Count(FI's issued)
Voided - Count(FI's voided)
Rejected - Count(FI's rejected)
Redeemed - Count(FI's redeemed)
Outstanding - Issued **-** (Voided + Rejected + Redeemed)

Producing a Directory Report of all Local Agencies

This report displays an internal or external directory of all agencies and their associated clinics. The internal directory displays the email address, contact, name, phone and fax numbers of the clinics. The external does not.

To Produce a Local Agency Directory Report:

1. Click on Outputs from the menu bar.
2. Position the Cursor on Reports, the reports sub-menu is displayed.
3. Click on Local Agency Directory as shown below:



The Local Agency Directory Window is displayed:

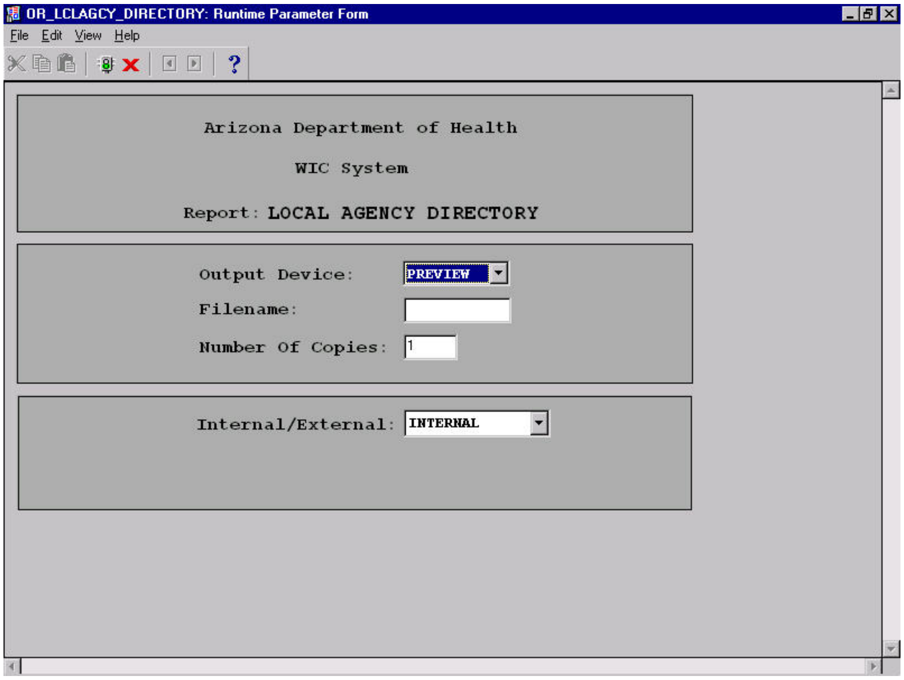
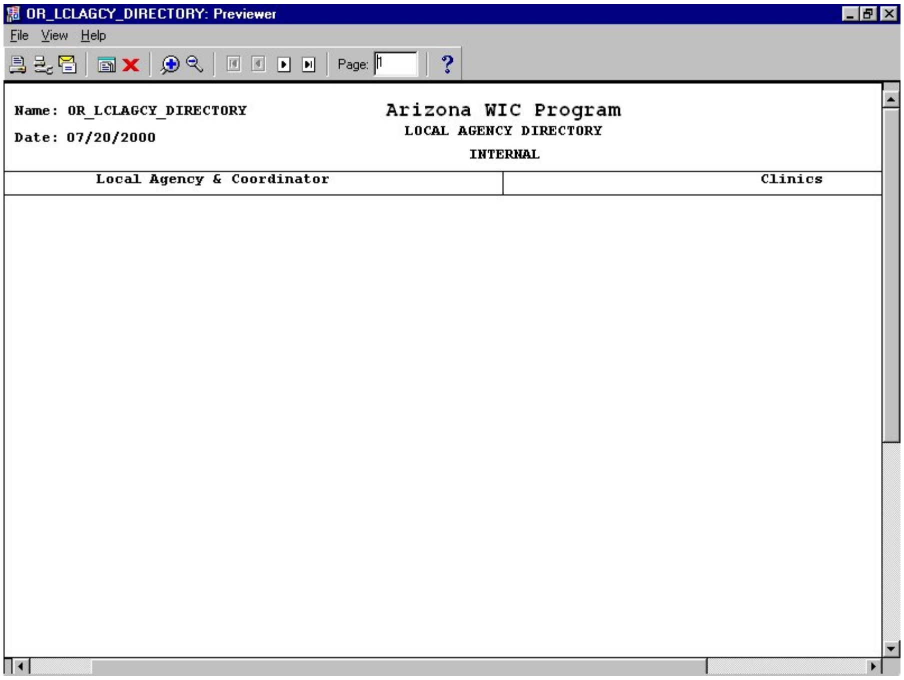


Figure 22 – Local Agency Directory

Produce a Directory Report of all Local Agencies

1. Click the down arrow in the Output Device field to activate the drop down box. Then select the output device by double clicking on that device name.
2. TAB to the Filename field. Enter the filename for the report.
3. TAB to the Number of Copies field. Type in the number of report copies desired in this field.
4. After information has been entered, click the green light icon.



Sample of Local Agency Directory Report

5. Click the Previous, Next, First, Last, and Page icons at the top of the screen to move forward and backward through the report pages.
6. Click the Print icon to print the report. To activate the system's E-mail capabilities, click the Mail icon.
7. Click the Close icon to exit the preview screen and return to the Operations Management Menu Screen. Click the New icon to view a new copy of the preview screen.

Fields

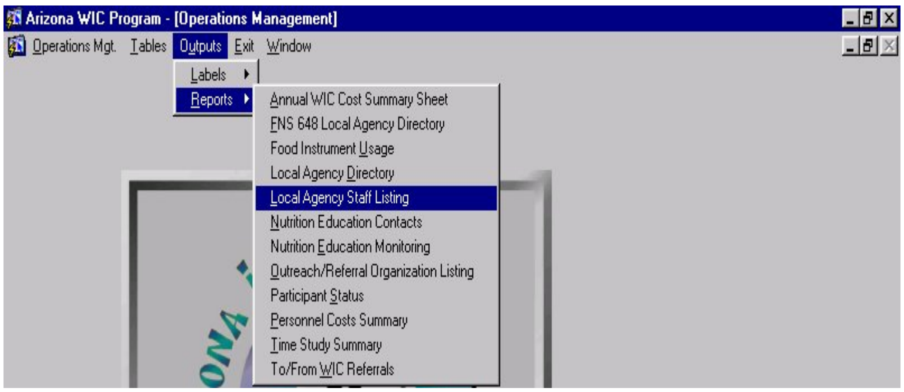
Output Device - Select whether to print, review, create a file or mail this document.
Filename - Select a file name of where to send in case a file is wanted.
Number of Copies - Select number of copies to print.
Internal/External – This allows the user to produce either an internal or external directory of all local agencies and their associated clinics. The internal directory displays the e-mail address, contact name, phone, and fax numbers of the clinics. The external report does not,

Producing a Local Agency Staff Listing Report

This report displays a list of all staff members assigned to a local agency as well as vacant positions. The report can also be selected to display only staff by a specific category, title, or name as well.

To Produce a Local Agency Staff Listing Report:

1. Click on Outputs from the menu bar.
2. Position the Cursor on Reports, the reports sub-menu is displayed.
3. Click on Local Agency Staff Listing as shown below:



The Local Agency Staff Listing Window is displayed:

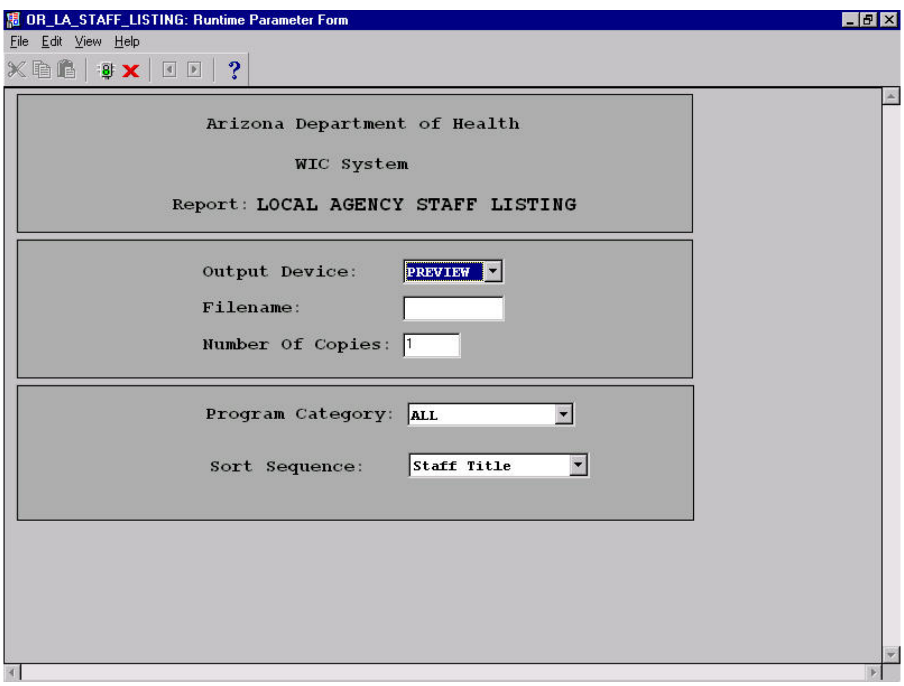
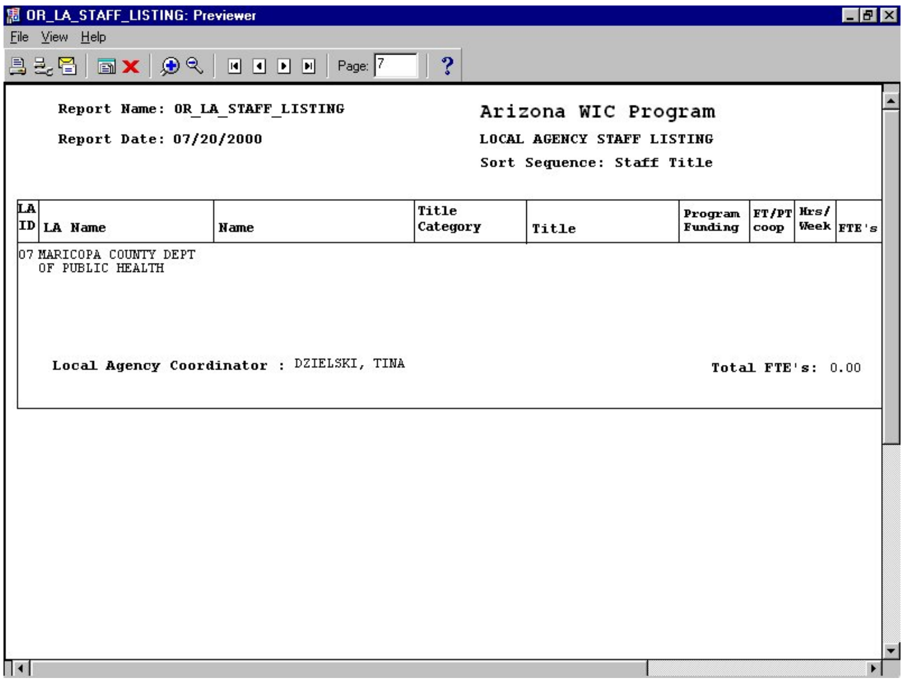


Figure 23 – Local Agency Staff Listing

Produce a Local Agency Staff Listing Report

1. Click the down arrow in the Output Device field to activate the drop down box. Then select the output device to send the report to by double clicking on that device.
2. TAB to the Filename field. Enter the filename of the report being generated.
3. TAB to the Number of Copies field. Type in the number of report copies desired in this field.
4. Complete the Sort Sequence field by performing the same steps used to complete the Output Device field. Click the down arrow to enable the drop down box and single click on selection.
5. After the information has been entered, click the green light icon.



Sample of Local Agency Staff Listing Report

6. Click the Previous, Next, First, Last, and Page icons at the top of the screen to move forward and backward through the report pages.
7. Click the Print icon to print the report. To activate the system's E-mail capabilities, click the Mail icon.
8. Click the Close icon to exit the preview screen and return to the Operations Management Menu Screen. Click the New icon to view a new copy of the preview screen.

Fields

Output Device - Select whether to print, review, create a file or mail this document.
Filename - Select a file name of where to send in case a file is wanted.
Number of Copies - Select number of copies to print.
Program Category – Clicking on the list of values allows the user to select a specific program category for which to generate a local agency staff listing. The values the user can choose from in this list will be identical to those stored in the Program Categories window (i.e., WIC, CSF, Tobacco, Immunization, etc.). For more information, refer to the Program Categories window.

Sort Sequence - Allows a choice of staff title, category, or name.

Calculation(s)

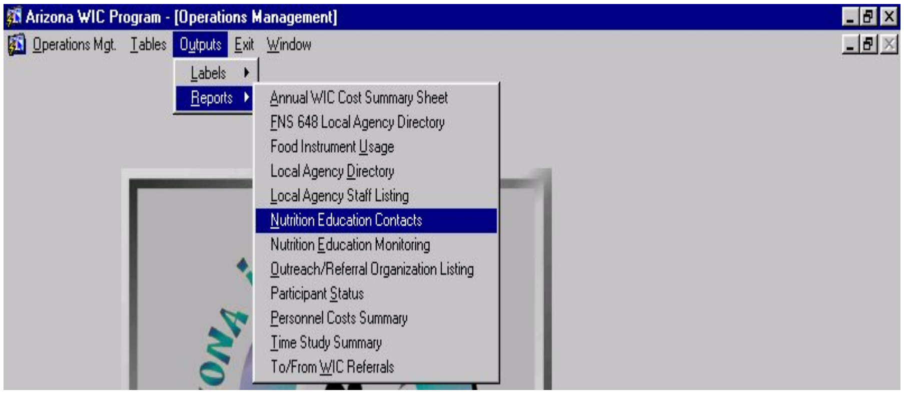
Total FTE's - The Sum of the total staff FTE's for each Local Agency.

Producing a Nutrition Education Contacts Report

This report displays a summary of nutrition education contacts by local agency and/or the State for a user specified range of dates.

To Produce a Nutrition Education Contacts Report:

1. Click on Outputs from the menu bar.
2. Position the Cursor on Reports. The report sub-menu is displayed.
3. Click on Nutrition Education Contacts as shown below:



The Nutrition Education Contacts Window is displayed:

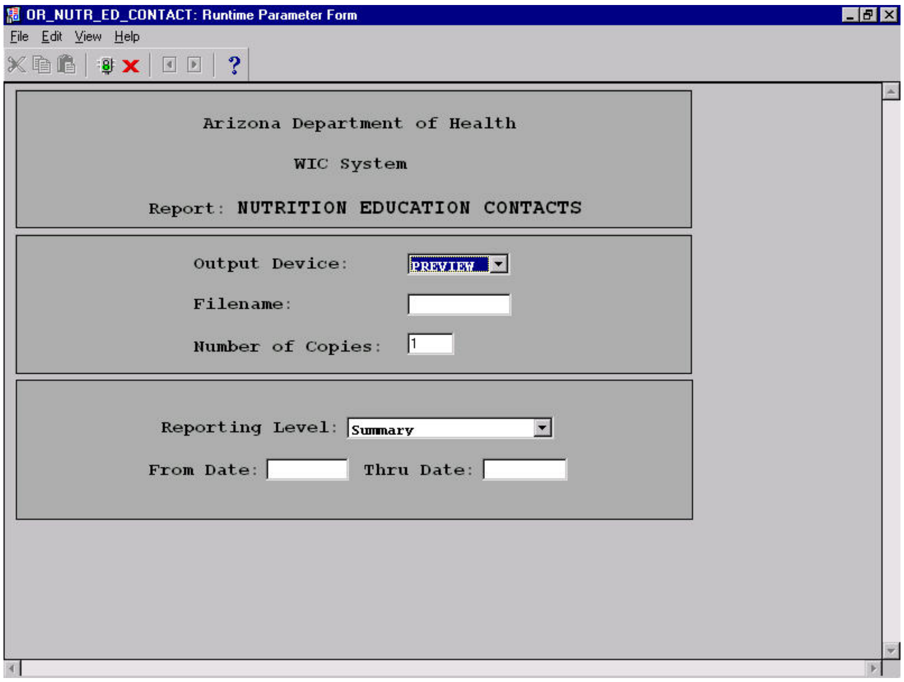
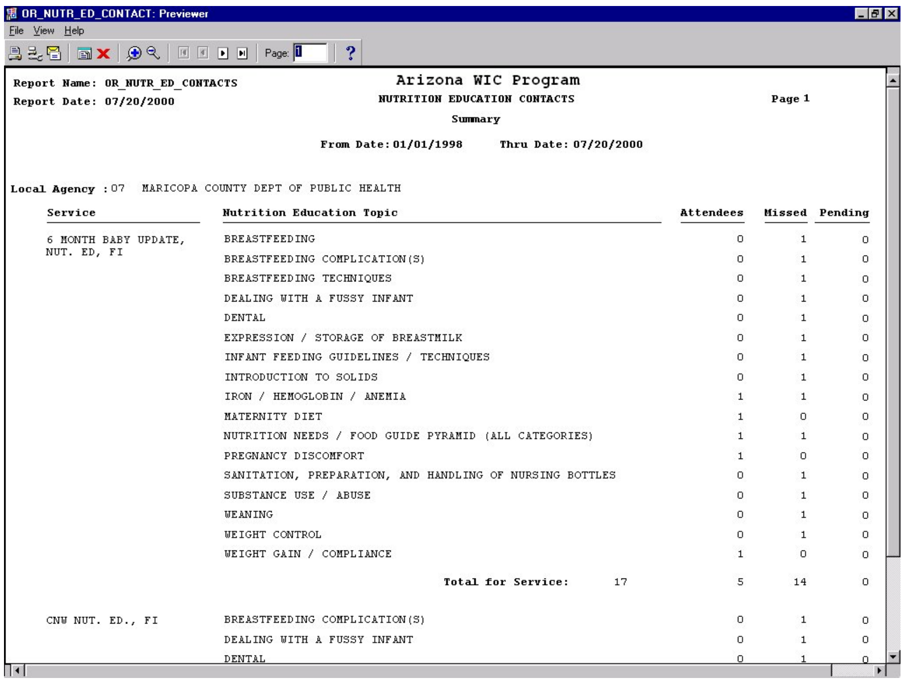


Figure 24 – Nutrition Education Contacts

Produce a Nutrition Education Contacts Report

1. Click the down arrow in the Output Device field to activate the drop down box. Then select the output device to send the report by double clicking on that device.
2. TAB to the Filename field. Enter the filename of the report being generated.
3. TAB to the Number of Copies field. Type the number of report copies desired in this field.
4. Complete the Reporting Level field by performing the same steps used to complete the Output Device field. Click the down arrow to activate the drop down box, then single click on selection.
5. Next, enter the date range you want the report to encompass by entering the From Date and Thru Date (Note: These dates should be formatted MM/DD/YYYY).
6. After information has been entered, click the green light icon.



Report Name: OR_NUTR_ED_CONTACTS
Report Date: 07/20/2000

Arizona WIC Program
NUTRITION EDUCATION CONTACTS
Summary
Page 1

From Date: 01/01/1998 Thru Date: 07/20/2000

Local Agency : 07 MARICOPA COUNTY DEPT OF PUBLIC HEALTH

Service	Nutrition Education Topic	Attendees	Missed	Pending
6 MONTH BABY UPDATE, NUT. ED, FI	BREASTFEEDING	0	1	0
	BREASTFEEDING COMPLICATION(S)	0	1	0
	BREASTFEEDING TECHNIQUES	0	1	0
	DEALING WITH A FUSSY INFANT	0	1	0
	DENTAL	0	1	0
	EXPRESSION / STORAGE OF BREASTMILK	0	1	0
	INFANT FEEDING GUIDELINES / TECHNIQUES	0	1	0
	INTRODUCTION TO SOLIDS	0	1	0
	IRON / HEMOGLOBIN / ANEMIA	1	1	0
	MATERNITY DIET	1	0	0
	NUTRITION NEEDS / FOOD GUIDE PYRAMID (ALL CATEGORIES)	1	1	0
	PREGNANCY DISCOMFORT	1	0	0
	SANITATION, PREPARATION, AND HANDLING OF NURSING BOTTLES	0	1	0
	SUBSTANCE USE / ABUSE	0	1	0
	WEANING	0	1	0
	WEIGHT CONTROL	0	1	0
	WEIGHT GAIN / COMPLIANCE	1	0	0
	Total for Service: 17	5	14	0
CNW NUT. ED., FI	BREASTFEEDING COMPLICATION(S)	0	1	0
	DEALING WITH A FUSSY INFANT	0	1	0
	DENTAL	0	1	0

Sample of Nutrition Education Contacts Report

1. Click the Previous, Next, First, Last, and Page icons at the top of the screen to move forward and backward through the report pages.
2. Click the Print icon to print the report. To activate the system's E-mail capabilities, click the Mail icon.
3. Click the Close icon to exit the preview screen and return to the Operations Management Menu Screen. Click the New icon to view a new copy of the same preview screen.

Fields

Output Device - Select whether to print, review, create a file or mail this document.
Filename - Select a file name of where to send in case a file is wanted.
Number of Copies - Select number of copies to print.
Reporting Level - Gives the user the choice of reporting by summary or detail/summary.
From Date - The beginning date on which the report will query records, falling either on or after this date.

Thru Date - The ending date on which the report will query records, falling either on or before this date.

Calculations

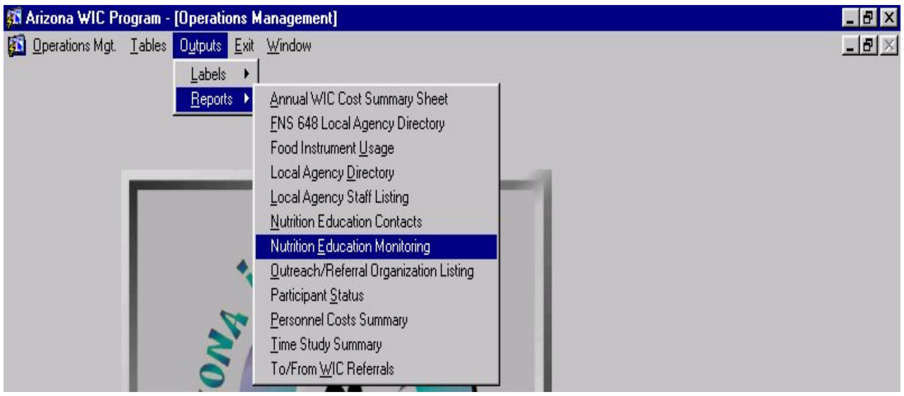
Attendee, Missed, Pending – Sum of the number of participants who attended, missed, or have pending appointments by service.
Total for Service – Sum of the number of participants for all services and Sum of all participants who have attended, missed, or have pending appointments for all services.
Local Agency Total - The sum of all the appointments attended, missed and pending for each Local Agency.
State Agency Total - The sum of all the appointments attended, missed and pending for the State Agency.

Producing a Nutrition Education Monitoring Report

This report displays by Local Agency and clinic the number of nutrition education contacts for each participant for a user-specified range of dates.

To Produce a Nutrition Education Monitoring Report:

1. Click on Outputs from the menu bar.
2. Position the Cursor on Reports. The report sub-menu is displayed.
3. Click on Nutrition Education Monitoring as shown below:



The Nutrition Education Monitoring Window is displayed:

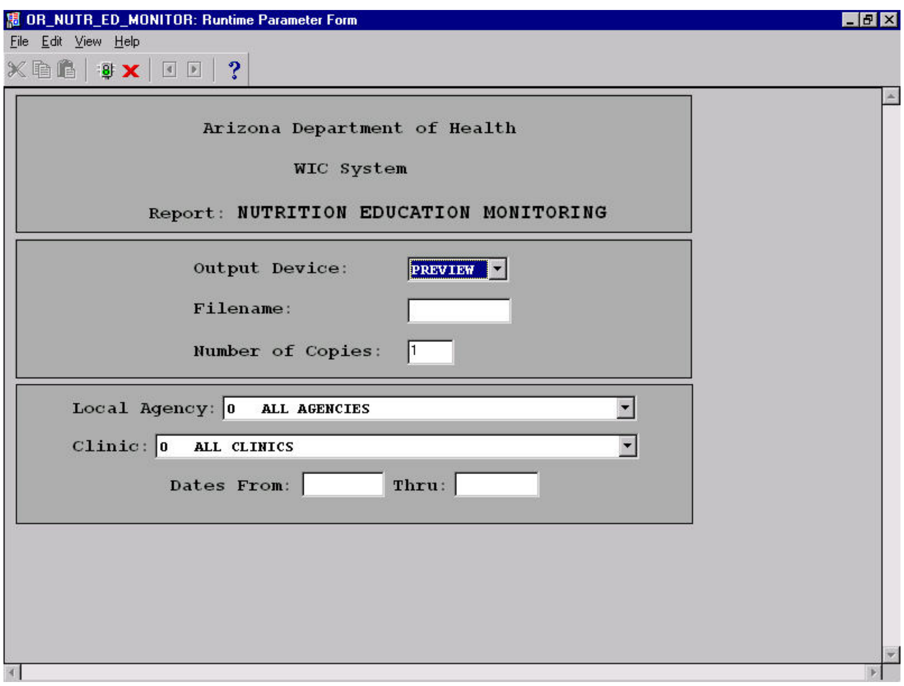
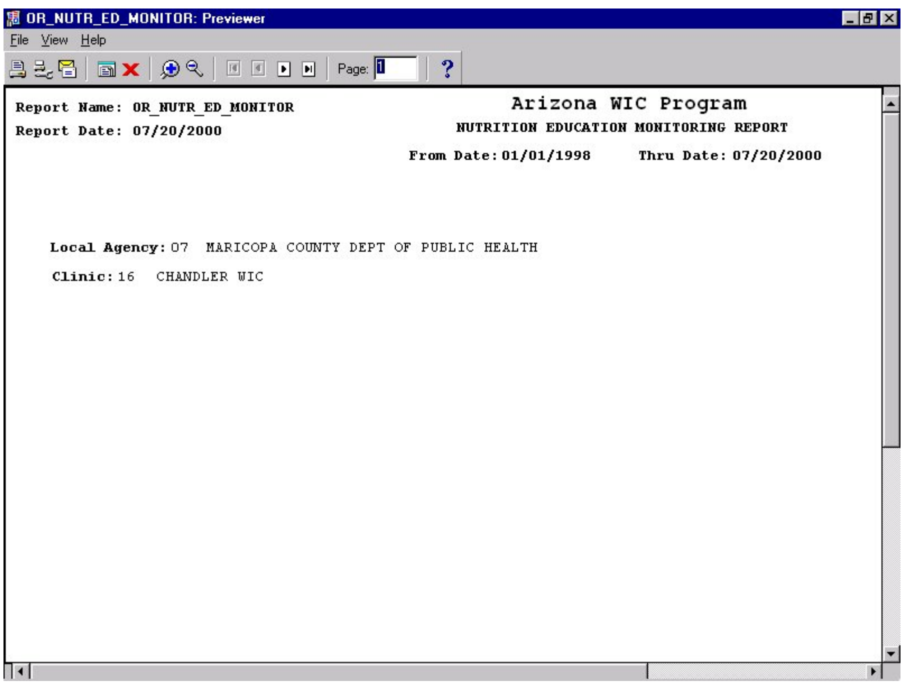


Figure 25 – Nutrition Education Monitoring

Produce a Nutrition Education Monitoring Report

1. Click the List of values button for the Output Device field and select the output device to send the report to by double clicking on that device.
2. If "File" is selected as the Output Device, TAB to the Filename field. Enter the filename of the report being generated.
3. TAB to the Number of Copies field. Type the number of report copies desired in this field.
4. Click the list of values button for the Local Agency field and select either ALL Agencies or a single Agency for which the report will be generated. The available agencies will be based on the user log on.
5. Click the list of values button for the Clinic field and select either ALL Clinics or a single Clinic for which the report will be generated. The available clinics will be based on the user log on and the selected Local Agency.
6. Next, enter the date range you want the report to encompass by entering the Date From and Thru Date (Note: These dates should be formatted MM/DD/YYYY).
7. After information has been entered, click the green light icon.



Sample of Nutrition Education Monitoring Report

1. Click the Previous, Next, First, Last, and Page icons at the top of the screen to move forward and backward through the report pages.
2. Click the Print icon to print the report. To activate the system's E-mail capabilities, click the Mail icon.
3. Click the Close icon to exit the preview screen and return to the Operations Management Menu Screen. Click the New icon to view a new copy of the same preview screen.

Fields

Output Device - Select whether to print, review, create a file or mail this document.
Filename - Select a file name of where to send in case a file is wanted.
Number of Copies - Select number of copies to print.
Local Agency – Select the desired agency(s)
Clinic – Select the desired clinic(s).
Dates From - The beginning date on which the report will query records, falling either on or after this date..
Thru - The ending date on which the report will query records, falling either on or before this date.

Calculations

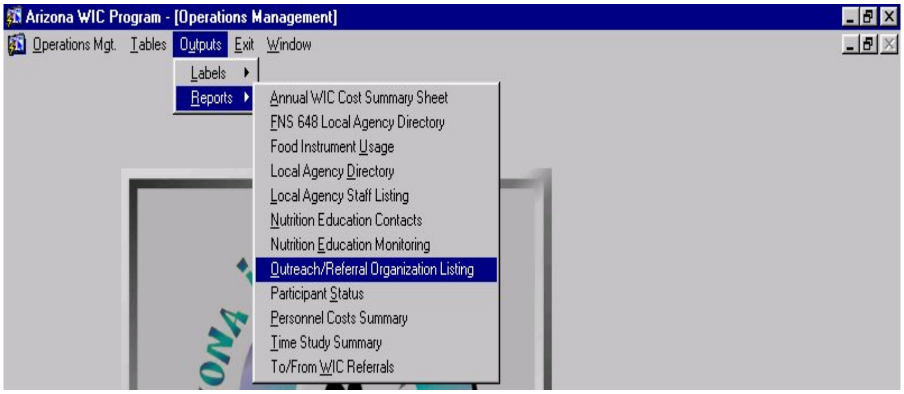
# of Nutrition Ed. Contacts – Sum of total number of nutrition education contacts for the specific participant whose certification period has ended, and has been issued food instruments for all 6 months.

Producing Outreach/Referral Organization Listing Reports

This report displays general listing of Outreach/Referral organizations and the program categories for which they provide services.

To Produce an Outreach/Referral Organization Listing Report:

1. Click on Outputs from the menu bar.
2. Position the Cursor on Reports. The reports sub-menu is displayed.
3. Click on Outreach/Referral Organization Listing as shown below:



The Outreach/Referral Organization Window is displayed:

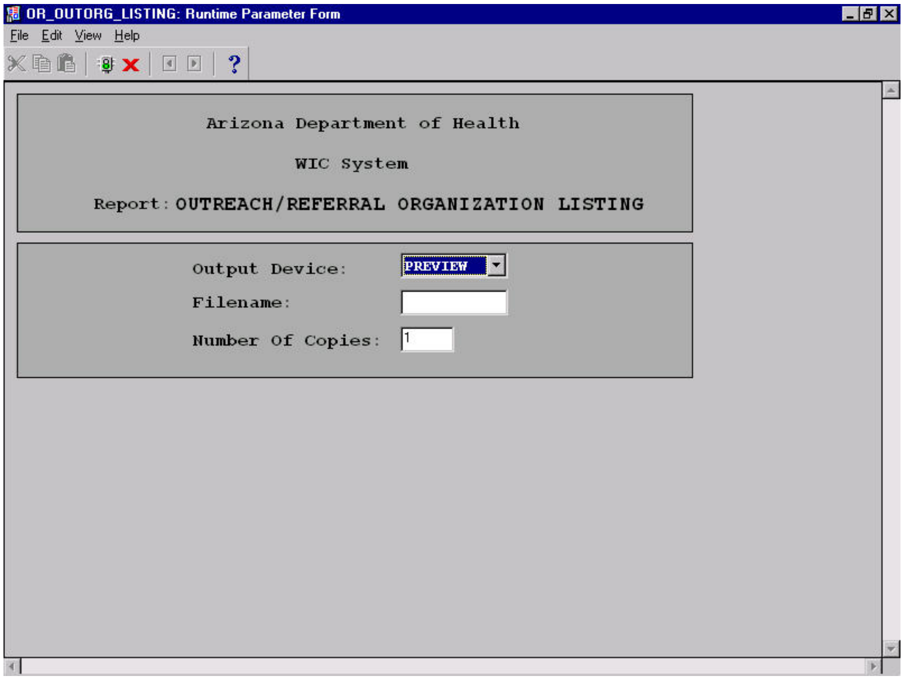
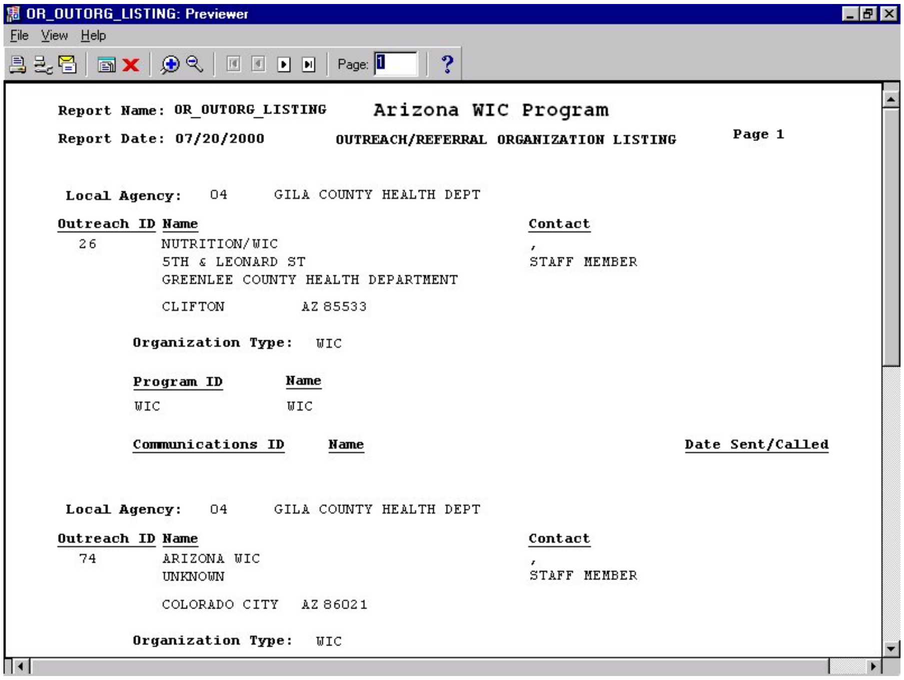


Figure 26 – Outreach/Referral Organization Listing

Produce an Outreach/Referral Organization Listing Report

1. Click the down arrow in the Output Device field to activate the drop down box. Then select the output device.

2. TAB to the Filename field. Enter the filename the report is to be called.
3. TAB to the Number of Copies field. Type in the number of report copies in this field.
4. After the information has been entered, click the green light icon.



Sample of Outreach/Referral Organization Listing

1. Click the Previous, Next, First, Last, and Page icons at the top of the screen to move forward and backward through the report pages.
2. Click the Print icon to print the report. To activate the system's E-mail capabilities, click the Mail icon.
3. Click the Close icon to exit the preview screen and return to the Operations Management Menu Screen. Click the New icon to view a new copy of the preview screen.

Fields

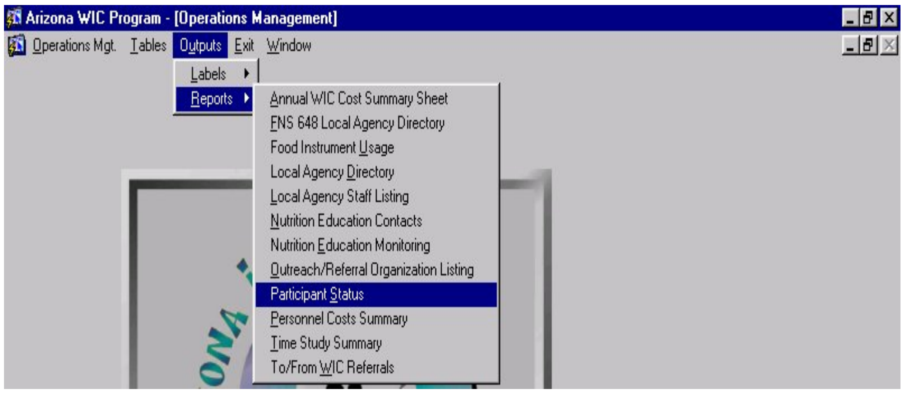
Output Device - Select whether to print, review, create a file or mail this document.
Filename - Select a file name of where to send in case a file is wanted.
Number of Copies - Select number of copies to print.

Producing a Participant Status Report

This report will display based on selected characteristics of the WIC or CSF Participant population used to measure change and trends for predicting caseload patterns. This report also appears under the same name in the Financial Management module.

To Produce a Participant Status Report:

1. Click on Outputs from the menu bar.
2. Position the Cursor on Reports. The report sub-menu is displayed.
3. Click on Participant Status as shown below:



The Participant Status Window is displayed:

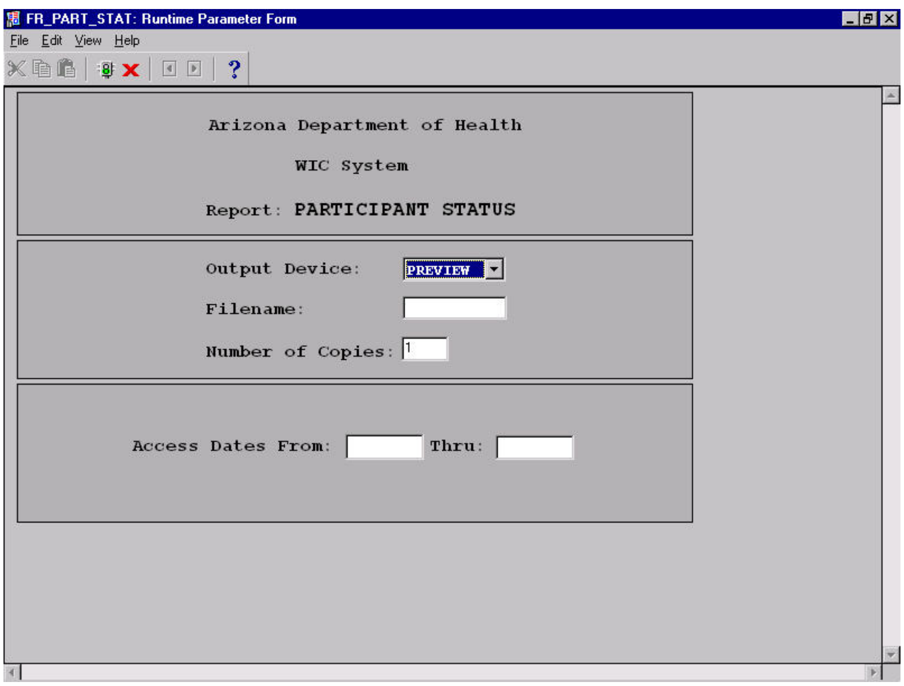
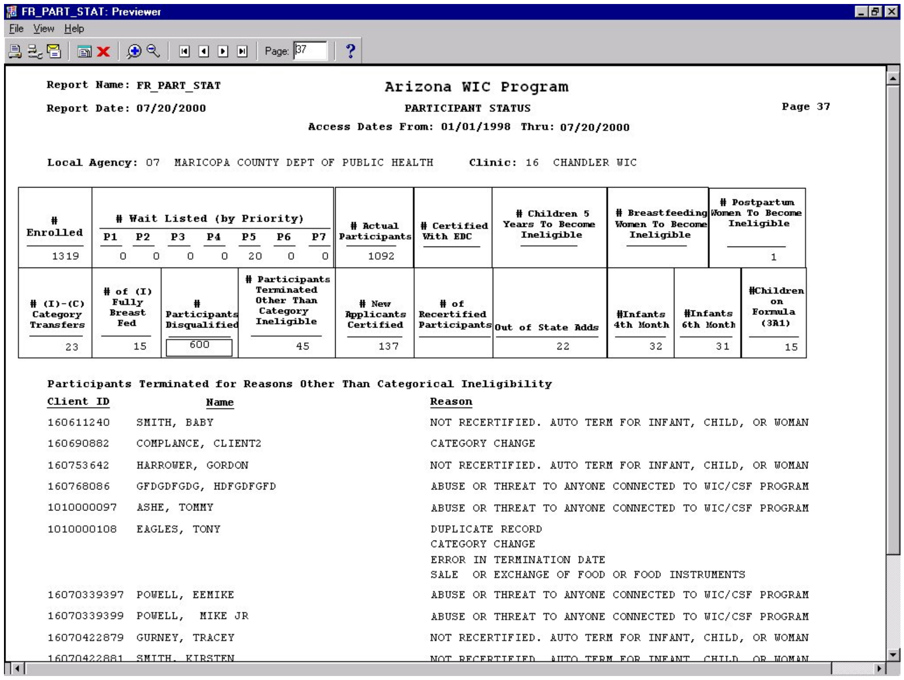


Figure 27 – Participant Status

Produce a Participant Status Report

1. Click the List of values button for the Output Device field and select the output device to send the report to by double clicking on that device.

2. If "File" is selected as the Output Device, TAB to the Filename field. Enter the filename of the report being generated.
3. TAB to the Number of Copies field. Type the number of report copies desired in this field.
4. Next, enter the date range you want the report to encompass by entering the Access Date From and Thru Date (Note: These dates should be formatted MM/DD/YYYY).
5. After information has been entered, click the green light icon.


FR_PART_STAT: Previewer
File View Help
Page: 37

Report Name: FR_PART_STAT
Arizona WIC Program
Report Date: 07/20/2000
PARTICIPANT STATUS
Page 37
Access Dates From: 01/01/1998 Thru: 07/20/2000

Local Agency: 07 MARICOPA COUNTY DEPT OF PUBLIC HEALTH Clinic: 16 CHANDLER WIC

# Enrolled	# Wait Listed (by Priority) P1	P2	P3	P4	P5	P6	P7	# Actual Participants	# Certified With EDC	# Children 5 Years To Become Ineligible	# Breastfeeding Women To Become Ineligible	# Postpartum Women To Become Ineligible
1319	0	0	0	0	20	0	0	1092				1

# (I)-(C) Category Transfers	# of (I) Fully Breast Fed	# Participants Disqualified	# Participants Terminated Other Than Category Ineligible	# New Applicants Certified	# of Recertified Participants	Out of State Adds	#Infants 4th Month	#Infants 6th Month	#Children on Formula (3A1)
23	15	600	45	137		22	32	31	15

Participants Terminated for Reasons Other Than Categorical Ineligibility

Client ID	Name	Reason
160611240	SMITH, BABY	NOT RECERTIFIED. AUTO TERM FOR INFANT, CHILD, OR WOMAN
160690882	COMPLANCE, CLIENT2	CATEGORY CHANGE
160753642	HARROWER, GORDON	NOT RECERTIFIED. AUTO TERM FOR INFANT, CHILD, OR WOMAN
160768086	GFDGDFGDG, HDFGDFGFD	ABUSE OR THREAT TO ANYONE CONNECTED TO WIC/CSF PROGRAM
1010000097	ASHE, TOMMY	ABUSE OR THREAT TO ANYONE CONNECTED TO WIC/CSF PROGRAM
1010000108	EAGLES, TONY	DUPLICATE RECORD CATEGORY CHANGE ERROR IN TERMINATION DATE SALE OR EXCHANGE OF FOOD OR FOOD INSTRUMENTS
16070339397	POWELL, EEMIKE	ABUSE OR THREAT TO ANYONE CONNECTED TO WIC/CSF PROGRAM
16070339399	POWELL, MIKE JR	ABUSE OR THREAT TO ANYONE CONNECTED TO WIC/CSF PROGRAM
16070422879	GURNEY, TRACEY	NOT RECERTIFIED. AUTO TERM FOR INFANT, CHILD, OR WOMAN

Sample of Participant Status Report

1. Click the Previous, Next, First, Last, and Page icons at the top of the screen to move forward and backward through the report pages.
2. Click the Print icon to print the report. To activate the system's E-mail capabilities, click the Mail icon.
3. Click the Close icon to exit the preview screen and return to the Operations Management Menu Screen. Click the New icon to view a new copy of the same preview screen.

Fields

Output Device - Select whether to print, review, create a file or mail this document.
Filename - Select a file name of where to send in case a file is wanted.
Number of Copies - Select number of copies to print.
Access Dates From - The beginning date on which the report will query records, falling either on or after this date.
Thru - The ending date on which the report will query records, falling either on or before this date.

Calculations

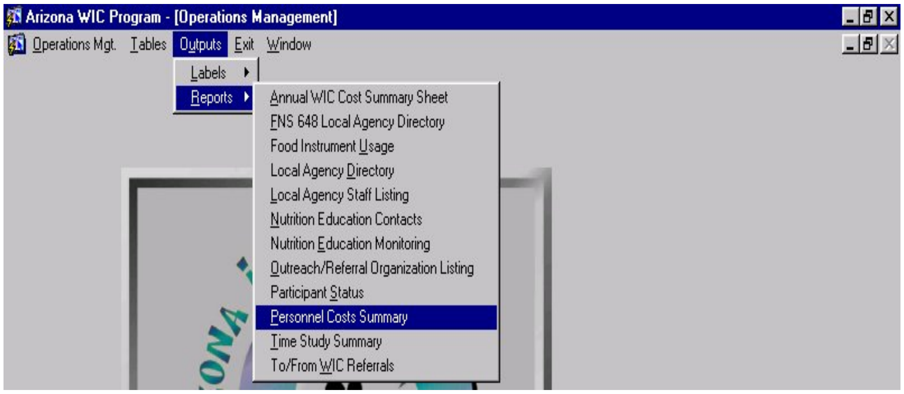
**Enrolled - ** COUNT (CERTIFICATION_CERT_START_DATE)
 # Wait Listed P1...P7 - COUNT(Wait_List_Flag)
 # Actual Particip - COUNT(Issuance Participation)
 # Cert (P) With EDC - COUNT(Category)
 # Children 5 Years To become Ineligible - COUNT(Termination_Date)
 # Breastfeeding Women To become Ineligible - COUNT(Termination_Date)
 # Postpartum Women To become Ineligible - COUNT(Termination_Date)
Participant Terminated Other Than Category Ineligible - COUNT(Termination_Date)
 # New Applicants Certified - COUNT(Certification = 1)
# of Recertified Participants - COUNT(Certification > 1)
Out of State Adds - COUNT(Certification)

Producing a Personnel Cost Summary Report

This report will display details on personnel costs for each staff member at a clinic based upon the user selected activity category.

To Produce a Personnel Cost Summary Report:

1. Click on Outputs from the menu bar.
2. Position the Cursor on Reports. The report sub-menu is displayed.
3. Click on Personnel Cost Summary as shown below:



The Personnel Cost Summary Window is displayed:

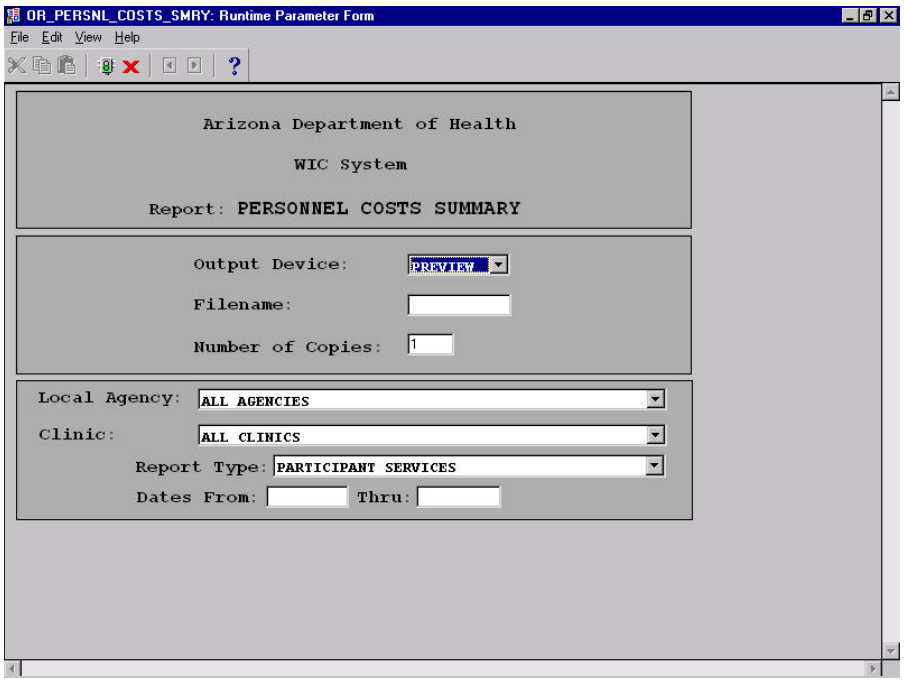
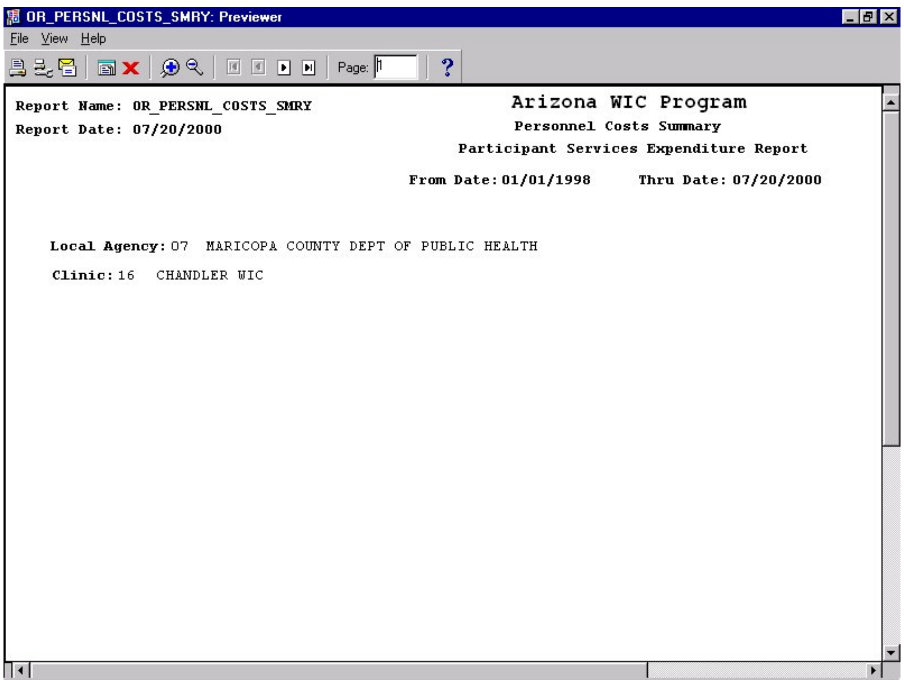


Figure 28 – Personnel Costs Summary

Produce a Personnel Cost Summary Report

1. Click the List of values button for the Output Device field and select the output device to send the report to by double clicking on that device.
2. If "File" is selected as the Output Device, TAB to the Filename field. Enter the filename of the report being generated.
3. TAB to the Number of Copies field. Type the number of report copies desired in this field.
4. Click the list of values button for the Local Agency field and select either ALL Agencies or a single Agency for which the report will be generated. The available agencies will be based on the user log on.
5. Click the list of values button for the Clinic field and select either ALL Clinics or a single Clinic for which the report will be generated. The available clinics will be based on the user log on and the selected Local Agency.
6. Click on the list of values button for the Report Type field and select the type of activity category.
7. Next, enter the date range you want the report to encompass by entering the Date From and Thru Date (Note: These dates should be formatted MM/DD/YYYY).
8. After information has been entered, click the green light report.



Sample of Personnel Cost Summary Report

1. Click the Previous, Next, First, Last, and Page icons at the top of the screen to move forward and backward through the report pages.
2. Click the Print icons to print the report. To activate the system's E-mail capabilities, click the Mail icon.
3. Click the Close icon to exit the preview screen and return to the Operations Management Menu Screen. Click the New icon to view a new copy of the same preview screen.

Fields

Output Device - Select whether to print, review, create a file or mail this document.
Filename - Select a file name of where to send in case a file is wanted.
Number of Copies - Select number of copies to print.
Local Agency – Select the desired agency(s)
Clinic – Select the desired clinic(s).
Report Type – Select the desired activity category type.
Dates From - The beginning date on which the report will query records, falling either on or after this date.
Thru - The ending date on which the report will query records, falling either on or before this date.

Calculations

Hours Worked in WIC - The system calculates for each employee the number of hours worked in WIC by adding the number of hours each employee spent performing Participant Services, Nutrition Education, Breastfeeding and Administration activities for the time period being reported on.
Hours Spent on XXXXXX - The system calculates for each employee of the number of hours spent on XXXXX by adding the number of hours each employee spent performing the XXXXX activity for the time period being reported on.
Percent of WIC Time on XXXXXX - The system calculates this percentage by dividing the number of hours spent on XXXXX for each employee by the number of hours worked in WIC and multiplying by 100.
Gross Annual Salary Plus Benefits With WIC $ - The system first calculates the staff member's Total Salary (Hourly Salary X 2080 hours per year X FTE). Then the system calculates the ERE Benefits cost (Total Salary X ERE%). Last, the system adds the two results and populates the report with the sum for each employee.
Annual Employee Cost for XXXXXX - The system calculates this field by multiplying the Percent of WIC Time on XXXXX by the Gross Annual Salary plus benefits with WIC $ and displays the result for each staff member.

The system also calculates totals of the counts calculated above:

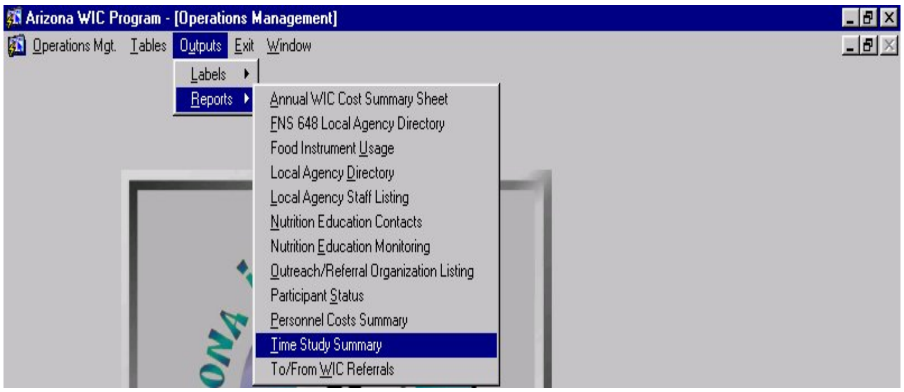
Total # of hours worked in WIC - SUM of this column for all employees listed in report.
Total # hours spent on XXXXXX - SUM of this column for all employees listed in report.
Total Percent of WIC time on XXXXXX- SUM of the %s for all employees listed in report / # of employees listed in report.
Total Gross Annual Salary plus benefits with WIC $ - SUM of this column for all employees listed in report.
Total Annual Employee cost for XXXXXXX - SUM of this column for all employees listed in report.

Producing a Time Study Summary Report

This report is generated once all the necessary information has been entered into the Time Study-Daily Log window. The report will display a summary of the number of hours spent by an employee performing various activities.

To Produce a Time Study Summary Report:

1. Click on Outputs from the menu bar.
2. Position the Cursor on Reports. The report sub-menu is displayed.
3. Click on Time Study Summary as shown below:



The Time Study Summary Window is displayed:

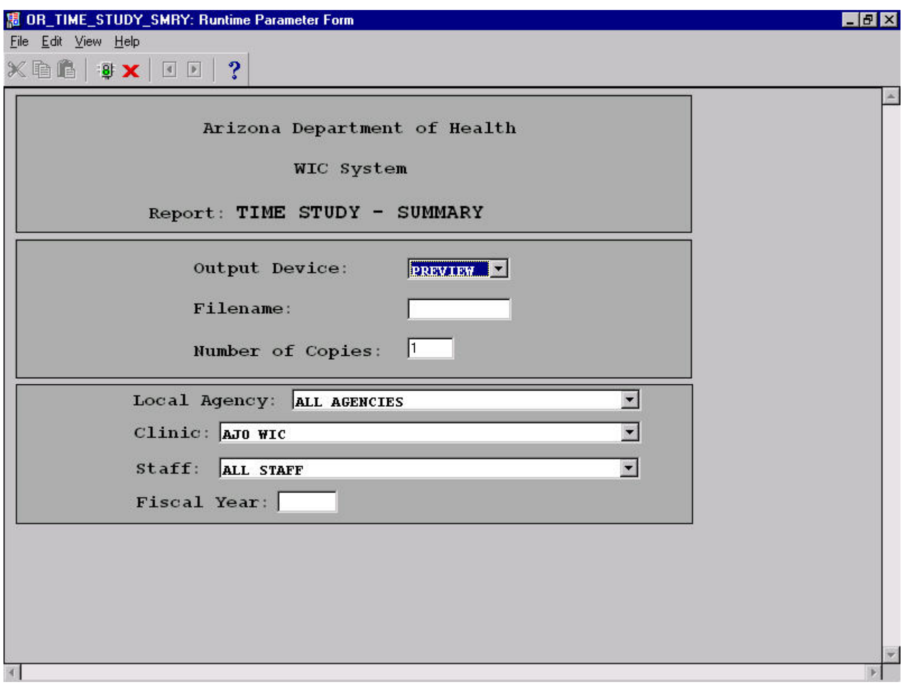
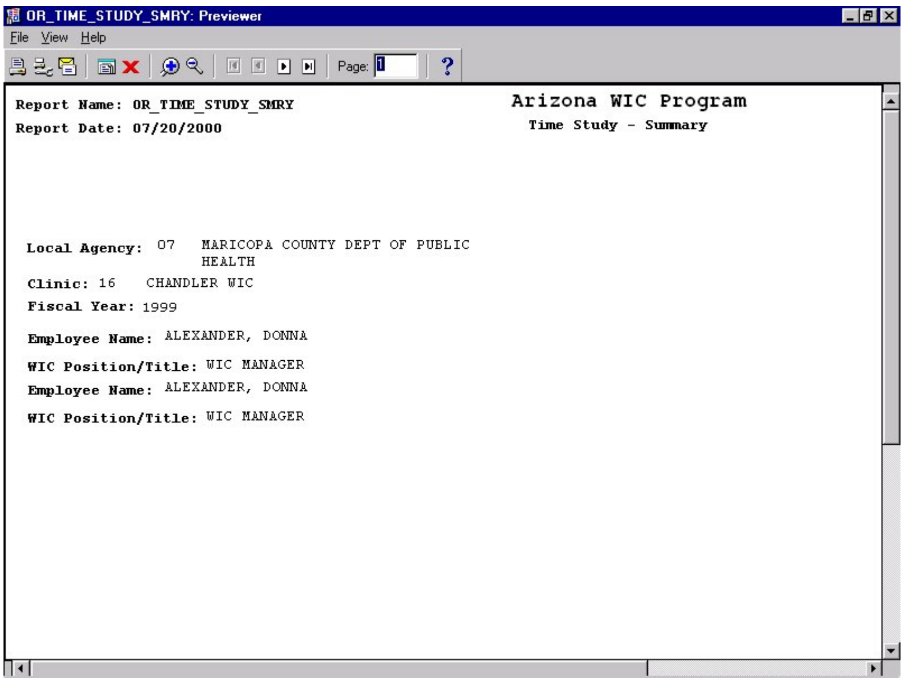


Figure 29 – Time Study - Summary

Produce a Time Study Summary Report

1. Click the List of values button for the Output Device field and select the output device to send the report to by double clicking on that device.
2. If "File" is selected as the Output Device, TAB to the Filename field. Enter the filename of the report being generated.
3. TAB to the Number of Copies field. Type the number of report copies desired in this field.
4. Click the list of values button for the Local Agency field and select either ALL Agencies or a single Agency for which the report will be generated. The available agencies will be based on the user log on.
5. Click the list of values button for the Clinic field and select either ALL Clinics or a single Clinic for which the report will be generated. The available clinics will be based on the user log on and the selected Local Agency.
6. Click on the list of values for the Staff field and select either ALL Staff or a single Staff member to display in the report.
7. TAB to the Fiscal Year field and enter the year the report will encompass.
8. After information has been entered, click the green light icon.



Sample of Time Study Summary Report

1. Click the Previous, Next, First, Last, and Page icons at the top of the screen to move forward and backward through the report pages.
2. Click the Print icon to print the report. To activate the system's E-mail capabilities, click the Mail icon.
3. Click the Close icon to exit the preview screen and return to the Operations Management Menu Screen. Click the New icon to view a new copy of the same preview screen.

Fields

Output Device - Select whether to print, review, create a file or mail this document.
Filename - Select a file name of where to send in case a file is wanted.
Number of Copies - Select number of copies to print.
Local Agency – Select the desired agency(s)
Clinic – Select the desired clinic(s).
Staff – Select the desired staff(s).
Fiscal Year – Select the desired fiscal year.

Calculations

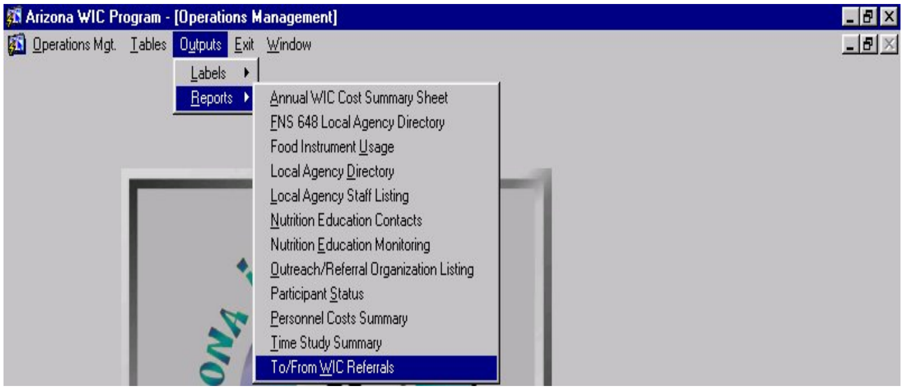
Part. Services, Nutrition Education, Breastfeeding, Administration, Immunization, CSFP, Tobacco, Other - The system calculates the number of hours entered by the staff member in the Time Study **-** Daily Log window that he/she worked in the performance of duties in each of the Activity columns, and displays each count in the field corresponding to the appropriate date. This allows the user to view the amount of time spent by the employee performing an activity (i.e., Participant Services) for a single date.
Monthly Totals - The system totals the number of hours displayed that the staff member worked in the performance of duties in each of the Activity columns and displays the total in the appropriate field in the Monthly Totals row. This allows the user to view the amount of time spent by the employee performing an activity (i.e., Nutrition Education) for the month the Time Study was conducted for the Fiscal year.

Producing To/From WIC Referrals Reports

This report summarizes monthly referrals by Local Agency to and from Outreach/ Referral organizations.

To Produce a To/From WIC Referrals Report:

1. Click on Outputs from the menu bar.
2. Position the Cursor on Reports. The reports sub-menu is displayed.
3. Click on To/From WIC Referrals as shown below:



The To/From WIC Referrals Window is displayed:

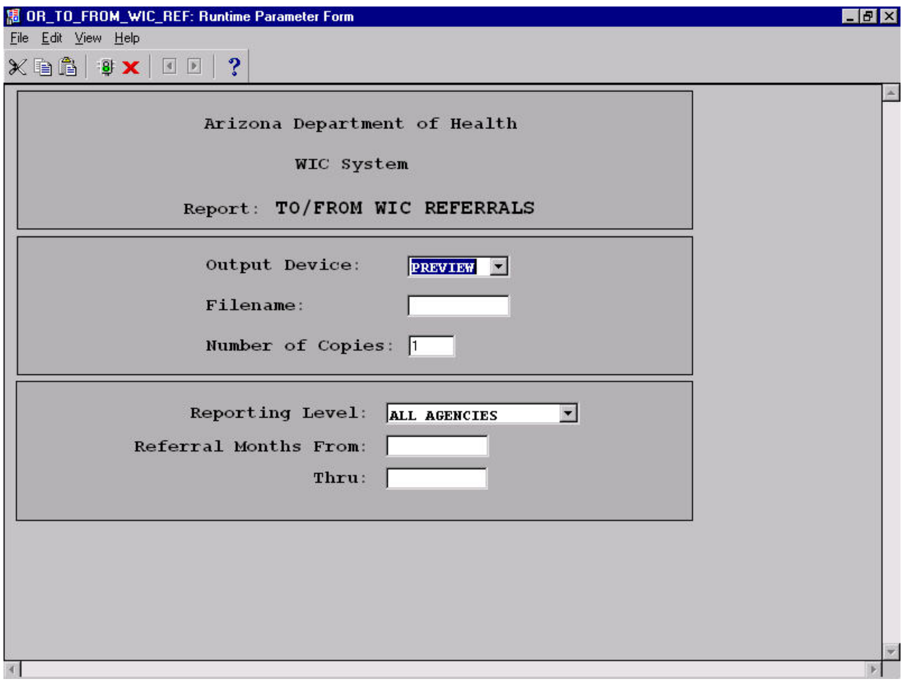


Figure 30 – To/From WIC Referrals

Produce a To/From WIC Referral Report

1. Click the down arrow in the Output Device field to activate the drop down box. Then select the output device desired by double clicking on that device name.
2. TAB to the Filename field. Enter the filename the report is to be called.
3. TAB to the Number of Copies field. Type in the number of report copies desired in this field.
4. Complete the Reporting Level field by performing the same steps used to complete the Output Device field. Click the down arrow to activate the drop down box, then double click on selection.
5. Next, enter the date range for the report to encompass by entering the Referral Months From and Thru (Note: These dates should be formatted MM/DD/YYYY).
6. After the information has been entered, click the green light report.

Sample of To/From WIC Referral Report – NOT AVAILABLE SCREEN IS BEING CHANGED

1. Click the Previous, Next, First, Last, and Page icons at the top of the screen to move forward and backward through the report pages.
2. Click the Print icon to print the report. To activate the system's E-mail capabilities, click the Mail icon.
3. Click the Close icon to exit the preview screen and return to the Operations Management Menu Screen. Click the New icon to view a new copy of the preview screen.

Fields

Output Device - Select whether to print, review, create a file or mail this document.
Filename - Select a file name of where to send in case a file is wanted.
Number of Copies - Select number of copies to print.
Reporting Level - The level of reporting to be selected.
Referral Months From - The user may enter the beginning date on which the report will query records, falling either on or after this date.
Referral Months Thru - The user may enter the ending date on which the report will query records, falling either on or before this date.

Calculation(s)

Total (Referral From) - The Sum of all the referrals from an Outreach / Referral Organization to the Local Agency.
Total (Referrals To) -The Sum of all the referrals from the Local Agency to each Outreach / Referral Organization.
Referrals From - The Sum by Type of all the referrals from Outreach / Referral Organizations to the Local Agency.
Referrals To - The Sum by Type of all the referrals from the Local Agency to Outreach / Referral Organizations.
Total (% of Total) - The percentage of the total referrals from and to for each Outreach / Referral Organization by dividing the total by the from or thru values and then multiplying by 100.
% of Total - The percentage of the total referral from and to for each outreach organization type by dividing the total by the from or thru values in the Outreach / Referral Organization Type row, and then multiplying by 100.
The value in the % of total column fields in the Total row should always be 100%.

List of Figures